

## **Chapter 5 Benefits Management**



### **Employee Benefits Enrollment**

This procedure will outline, in detail, the steps required to enroll a newly hired employee into the various benefit plans for which they are eligible. There are three preliminary steps required before we can start the actual benefit enrollment process.

Not all employees will need all three infotypes. Only create those that are applicable to each employee.

We must manually create three infotypes to set the foundation for the benefit enrollment:

- **Infotype 9003** - Retirement Plan Data at Termination, Preview Retirement Information
- **Infotype 0376** – Benefits Medical Information
- **Infotype 0021** – Family/Related Person

Use the following menu path or transaction code to start the process:

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > MASTER DATA > MAINTAIN**

Transaction code: **PA30**

**Maintain HR Master Data**

HR master data Edit Goto Extras Utilities Settings System Help

Personnel no. 765

Name THOMAS TESTERONI

EE group 5 NF Pers area 1297 Northwest Region MWR

EE subgroup FT Reg Full Time Cost center 488 CHILD DEV/EVE P..

Personal Data Addtl. Personal Data Benefit Information Taxes

Actions Personal Data Organizational Assignment Addressess Basic Pay Family/Related Person Residence Status Additional Personal Data Education DDD / MWR Specific Data

Period

Period

From To

Today All From current date To current date Current period

Current week Current month Last week Last month Current year

Choose

Direct selection

Infotype 9003 STy

We have entered a Personnel ID number in the Direct selection part of the window, and the infotype that we wish to create, in this case, infotype 9003 – Retirement Plan Data at Termination.

**This step is critical for an employee in order to capture the information that is on the retirement application concerning previous retirement information.**

Click the Create Icon  on the toolbar.

**Create Retirement Plan Data at Termination**

Infotype Edit Goto Extras System Help

Personnel no **765** Name **THOMAS** Status **Active**

EE group **5** NF Personnel ar **1287** Northwest Region MWR

EE subgroup **FT** Reg Full Time SSN **414-95-7812**

From **02/08/2001** to **12/31/9999**


**BUPERS or other NAFI Retirement Plans**

Previous Participation in Plan **N**

If Yes, Retirement Plan Option **N/A**

If Discontinue, Date

Field Name	Description	R/O/C	User Action/Values
<b>From Date</b>	The starting date of the plan enrollment	R	Enter the Starting date or use the dropdown arrow to select
<b>To Date</b>	The end date of the employee participation	R	The field will default to 12/31/9999. <b>Do Not Change</b>
<b>Previous participation in plan</b>	Were they in the plan before?	R	Enter Y or N to answer whether the employee was in the plan before
<b>If Yes, Retirement plan option</b>	User defined	C	If the answer to the previous question was Yes, use the dropdown arrow to select the appropriate answer from the following choices: A – Cash Surrender B – Paid up Annuity D – Discontinue
<b>If discontinue, Date</b>	User defined	C	If the answer to the previous question was “Discontinue”, you must enter the date of the discontinuance. The employee may stop a Retirement Plan deduction at any time voluntarily.

When the inputs are correct, Click the Enter icon 

You will be reminded to Save your entries. Do so by clicking on the Save icon .

The second of the three infotypes to be manually created is infotype 0376 – Benefits Medical Information. This is where the employee’s physician name and other related information is stored.

The number 0376 is entered directly into the infotype field in the Direct selection part of the window as we have done with the first infotype.

**Maintain HR Master Data**

HR master data Edit Goto Extras Utilities Settings System Help

Personnel no. **765**

Name **THOMAS TESTERONI**

EE\_group **5** NF Pers.area **1287** Northwest Region MWR

EE subgroup **FT** Reg Full Time Cost center **480** CHILD DEV EVE P...

Personal Data Addtl. Personal Data Benefit Information Taxes

Actions ☒

Personal Data ☒

Organizational Assignment ☒

Addresses ☒

Basic Pay ☒

Family/Related Person ☒

Residence Status ☒

Additional Personal Data ☒

Education ☐

DOD / MWR Specific Data ☐

**Period**

☒ Period

Fr.  To

☐ Today ☐ Curr. week

☐ All ☐ Current month

☐ From curr.date ☐ Last week

☐ To current date ☐ Last month

☐ Curr.period ☐ Current year


**Direct selection**

Infotype **Benefits Medical Information** STy

**Information**

Record created



Click the Create icon  again to open the following pop up window.

**Create Benefits Medical Information**

infotype Edit Goto Extras System Help

Personnel no **765** Name **THOMAS** Status Active

EE group **5** NF Personnel ar **1287** Northwest Region MWR

EE subgroup **FT** Reg Full Time SSN **414-95-7812**

From **02/08/2001** to **12/31/9999**

**Doctors**

Physician name **Travis C. Travis**

Physician ID **ABC12345**

Physician name

Physician ID

Physician name



Physician ID

**State of health**

☐ Smoker

At the Create Benefits Medical Information screen, the following inputs are required.

Field Name	Description	R/O/C	User Action/Values
<b>From</b>	Date of the benefit enrollment	R	Enter the begin date of the enrollment
<b>Physician's Name</b>	Name of the Primary Care Physician	R	Enter the Primary Care Physician
<b>Physician ID</b>	ID Number of the Primary Care Physician	R	Enter the ID Number


Click the enter icon  to validate the entries and the click the Save icon  to save the transaction.

**NOTE:** The physician is only used for initial enrollment into SAP. The physician name will be maintained with the provider from that point on.

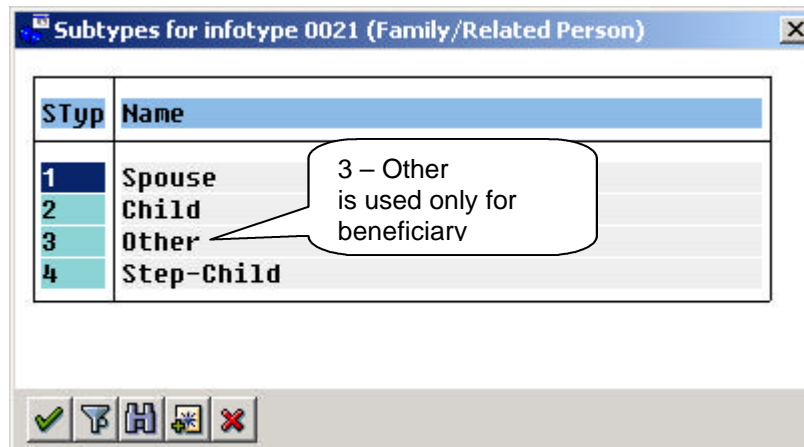


All dependent information will be kept in SAP except the physician information. Any Add, Change or Stopping of dependents will go through the Human Resources module.

The initial beneficiary must be in SAP, but changes to an existing beneficiary will be done by the provider.

The third and final of the manually entered infotypes is 0021 – Family/Related Person. Directly enter infotype 0021 into the field as we have done for the two previous infotypes and click the Create icon .

With this infotype, you will see an interim pop-up window asking for additional information as shown below.



Choose the Family/Related person that we are creating the infotype for. In the example that we are using, we highlight 1 – Spouse and click the green check mark.

**Display Family/Related Person**  
 Infotype Edit Goto Extras System Help

Personnel no: 765 Name: THOMAS Status: Active  
 EE group: 5 NF Personnel ar: 1287 Northwest Region MWR  
 EE subgroup: FT Reg Full Time SSN: 414-95-7812  
 From: 01/01/2001 To: 12/31/9999 Chng: 02/08/2001 HQ\_P657F2

Family type: Spouse

**Personal data**

Last name: TESTERONI  
 First name: ANGELINA  
 Gender: ☒ Female ☐ Male  
 Birth date: 02/24/1958  
 SSN: 123-45-4454 Tel.no: 360 555-1212  
 Street: 123 FANTAIL DRIVE Sep. date:  
 City/state: SILVERDALE WA Washington  
 Zip/country: 98315 US USA

**Physician**

Physician1: R.C. MCEWAN  
 ID number: 23  
 Physician2:  
 ID number:

**Status**



☐ Student  
☐ COBRA  
☐ Medicare  
☐ Smoker

**Challenge**

☐ Disability  
 Disab.date:  
 Learned:

Field Name	Description	R/O/C	User Actions/Values
<b>From Date</b>	Effective date of the benefit enrollment	R	Enter the effective date and leave the "To Date" as 12/31/9999"
<b>Family type</b>	Relationship	R	This field will be defaulted based on the subtype chosen in the pop-up window menu
<b>Last Name</b>	Last name of the beneficiary or dependent	R	Enter the last name.
<b>First Name</b>	First name of the beneficiary or dependent	R	Enter the first name
<b>Gender</b>	Female or male	R	Click the radio button next to the correct selection
<b>Birth Date</b>	Birth date of dependent. Birth date of beneficiary not required	R	Enter the birth date as required.

<b>SSN</b>	Social Security Number	R	Enter the Social Security Number of the dependent or beneficiary
<b>Street/City/State Zip/Country</b>	Permanent Address	R	Address of the dependent or beneficiary
<b>Physician</b>	Physician of the dependent	R	Enter the Primary Care Physician of the dependent
<b>ID Number</b>	Physician ID number	R	Enter the dependent's Primary Care Physician ID Number.
<b>Status</b>	Student	C	Required if dependent is over 19 years of age
<b>Challenge</b>	Whether the dependent is disabled/ handicapped.	C	Check if the dependent is disabled/ handicapped.

Once the screen is completed, Click the enter icon  to validate the entries and the click the Save icon  to save the transaction.

After completing all the dependents and/or beneficiaries, follow the menu path or transaction code to begin the actual Benefit Enrollment process. (See next page.)




## Benefit Enrollment Process

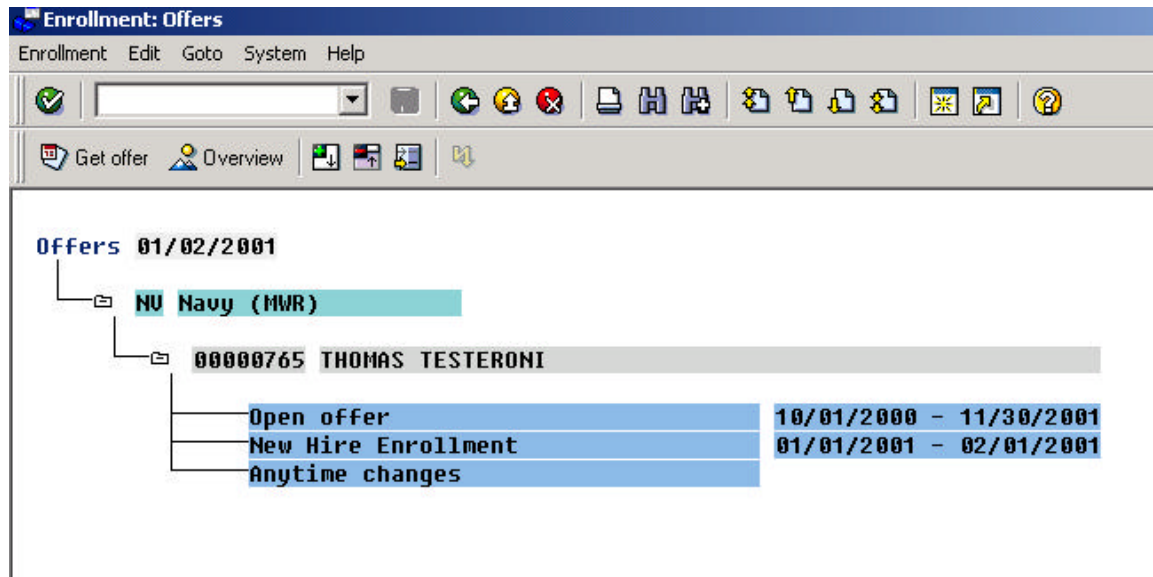
Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > BENEFITS > ENROLLMENT**

Transaction Code: **HRBEN0001**

Enter the information for this screen based on the table below.

Field Name	Description	R/O/C	User Action/Values
<b>Key Date</b>	Effective date of benefits	R	<p>If you are enrolling an employee on the current date, the button to the left of “Today” will be depressed and no change will be necessary. If you are enrolling at a later time, depress the button to the left of “Other keydates,” tab to the input field and enter the enrollment date using the format MM/DD/YYYY. <b>This date must be the date the employee signed the forms.</b> Enrollment must be within 31 days of hire date.</p>
<b>Selection</b>	Personnel Number	R	<p>Enter the employee’s personnel number and click the Execute icon  on the application toolbar</p>

You are now at a screen labeled “Enrollment Offers.”



Highlight the line reading “**New Hire Enrollment**” and click on the pushbutton labeled

Get Offer  Get offer

**OR** highlight the line reading “**New Hire Enrollment**” and double click.

The next screen will list all the plans that the employee is eligible for. This is the point where we can start the enrollment process.

Enrollment: Plan selection

Plan Edit Goto System Help

Enroll Overview

00000755 FELISA UIVO

Offer as of	02/14/2001	New enrollment dates
<b>Dental</b>		
Aetna Dental		02/14/2001 - 12/31/9999
<b>Medical</b>		
Aetna Medical		02/14/2001 - 12/31/9999
HMO Cigna Medical		02/14/2001 - 12/31/9999
<b>Basic Life/AD&amp;D</b>		
Basic Life / AD&D		02/14/2001 - 12/31/9999
<b>LTD</b>		
Long Term Disability		02/14/2001 - 12/31/9999
<b>Optional Life</b>		
Optional Life		02/14/2001 - 12/31/9999

DV2 (1) (200) mwrsap5 INS 10:30

This is a partial listing of the various benefits that this employee is eligible for.



**NOTE:** Employee must be enrolled in medical in order to be enrolled in dental. Dental appears first on enrollment list, and you can click first and accept, then click on medical to enroll employee.

The procedure for enrolling employees into any of the eligible plans is essentially the same. The first step is to highlight the plan and double click on the line. The first screen, which is typical of all of the benefit enrollment windows, is the Maintain Health Plan.

**Maintain Health Plan**

Pers.no. **765** THOMAS TESTERONI

Plan **Aetna Dental**

From **01/02/2001** - **12/31/9999**

☐ Stop participation in period

Option | Dependents

**Plan options**

Option **Aetna Dental**

Dependent cov. **Employee Only**

**Costs USD Bi-weekly**

Employee **3.00** ☒ Deducts pre-tax

Employer **0.00**

Accept

Field Name	Description	R/O/C	User Action/Values
<b>Option tab</b>	To select plan option and dependent coverage	R	Option field will default with the dental plan. Click on the dropdown arrow on the field labeled <b>Dependent cov.</b> and click on the coverage the employee has selected. The employee cost will automatically appear
<b>Dependent folder tab</b>	Dependents to be covered	R	Click on the Dependent folder tab to open. Click on the button to the left of each dependent's name. If there are no dependents, this tab will not appear. If no dependents are checked, they will not be enrolled through the interface.

Click the accept icon at the bottom of the pop-up enrollment window, the window closes and you will then return to the **Enrollment Plan Selection** screen.



**Highlight and double click** on the next indented plan in which you are enrolling the employee. We are showing the selection of Basic Life Insurance.

**Maintain Insurance Plan**

Pers.no. 765 THOMAS TESTERONI

Plan Basic Life / AD&D

From 01/02/2001 - 12/31/9999

☐ Stop participation in period

**Coverage** Beneficiaries

**Insurance option and coverage**

Insur. option Basic Life / AD&D

Basic cover. 21,000.00 USD

Addtl. units 2000 X 1.00 USD

Coverage 21,000.00 USD

**Costs USD Bi-weekly**

Employee 4.20 ☐ Deducts pre-tax

Employer 0.00

Accept

We enter and check the information as specified in the table below:

Field Name	Description	R/O/C	User Action/Values
<b>Coverage tab</b>	To select Basic Life/AD&D coverage	R	Insurance option defaults this plan. Input 2000 into the “Addtl units” field. <b>This field is configured to accept nothing else.</b> You will note that the Employee cost will automatically appear.
<b>Beneficiaries tab</b>	Input field	R	Click on the “Beneficiary Folder” and enter the percentage % of the benefit to be assigned each dependent.

Click the accept icon on the bottom of the pop-up window, the window will close and you will be returned to the “Enrollment Plan Selection” screen. Continue to highlight and double click on each of the indented plans in which you are enrolling an employee and proceed with each benefit enrollment following the same procedures as described above.

For example, for **Long Term Disability Insurance**:

**Maintain Insurance Plan**

Pers.no. **765** THOMAS TESTERONI

Plan **Long Term Disability**

From **01/02/2001** - **12/31/9999**

☐ Stop participation in period

**Coverage**

**Insurance option and coverage**

Insur. option **Long Term Disability**

Basic cover. **20,868.00** USD

Addtl. units **0 X** **0.00** USD

Coverage **20,868.00** USD

**Costs USD Bi-weekly**

Employee **12.04** ☐ Deducts pre-tax

Employer **0.00**

Accept

Click on the dropdown arrow on the **Ins. Option** line. Select either Long Term Disability or LTD Paid up.



Note: If choosing the Long-Term Disability option, the employee cost will appear. If choosing the Paid up option, the amount will be zero.

Click the accept icon on the bottom of the pop-up window, the window will close and you will be returned to the “Enrollment Plan Selection” screen.

The next example of the procedures is illustrated using the **Optional Life** enrollment.

**Maintain Insurance Plan**

Pers.no.: **765** THOMAS TESTERONI

Plan: **Optional Life**

From: **01/01/2001** - **12/31/9999**

☐ Stop participation in period

Coverage | Beneficiaries

**Insurance option and coverage**

Insur. option: **Optional Life 1X Sal**

Basic cover.: **21,000.00** USD



Addtl. units: **0 X** **0.00** USD


Coverage: **21,000.00** USD

**Costs USD Bi-weekly**

Employee: **3.15** ☐ Deduct pre-tax

Employer: **0.00**

 Accept 

Enter the appropriate information on the Coverage and Beneficiaries tabs. Click the Accept  icon and you will be returned to the "Enrollment Plan Selection" screen.

The next example of the procedures is illustrated using the **401K Savings Plan** enrollment.

The inputs for this **Maintain Savings Plan** screen are as follows. The table below explains the inputs for all three of the folder tabs.

Tab Names	Description	R/O/C	User Action/Values
<b>Contributions Regular</b>	Pre-tax, bi-weekly contribution	R	Percentage. Enter a percentage amount between 1 – 15%. The system will generate an error if the percentage is over 15%.
<b>Investments</b>	Input field. This must be selected for new enrollments. Changes will be handled directly by the vendor.	R	Click on the <b>Investments</b> tab. Enter the percentage of investments applicable to each plan. Percentages must total 100%
<b>Beneficiaries</b>	Input field. This must be selected for new enrollments. Changes will be handled directly by the vendor.	R	Click on the <b>Beneficiaries</b> tab. Enter the % of the benefit to be distributed to each beneficiary. If the beneficiary is someone other than a spouse, the date must also be entered in the Spousal Consent field.

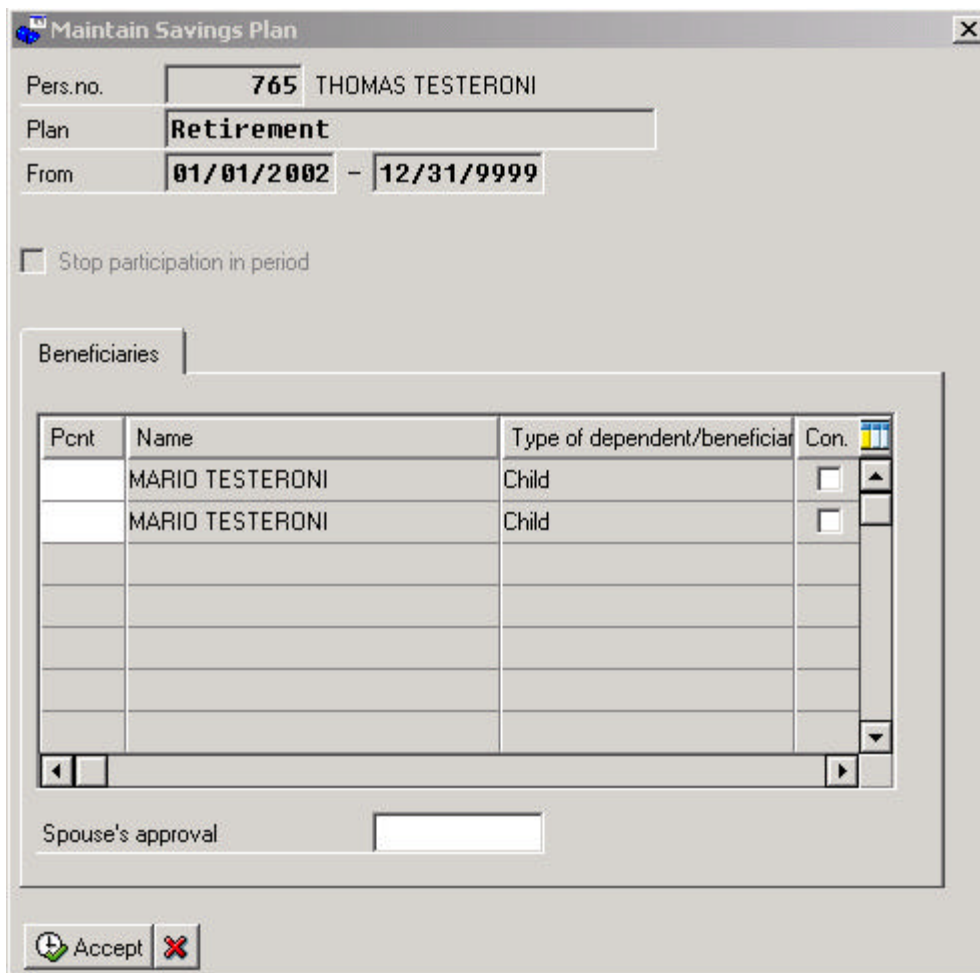
Click the Accept icon  on the bottom of the pop-up window, the window will close and you will be returned to the “Enrollment Plan Selection” screen.



**NOTE:** The date of enrollment for this benefit is the beginning date of the next quarter.

You will proceed through the balance of the remaining available benefit selections in exactly the same way.

The next example shows the Retirement option.



**Maintain Savings Plan**

Pers.no. **765** THOMAS TESTERONI

Plan **Retirement**

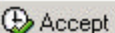

From **01/01/2002** - **12/31/9999**

☐ Stop participation in period


**Beneficiaries**

Pcnt	Name	Type of dependent/beneficiary	Con.
	MARIO TESTERONI	Child	<input type="checkbox"/>
	MARIO TESTERONI	Child	<input type="checkbox"/>


Spouse's approval

 Accept 

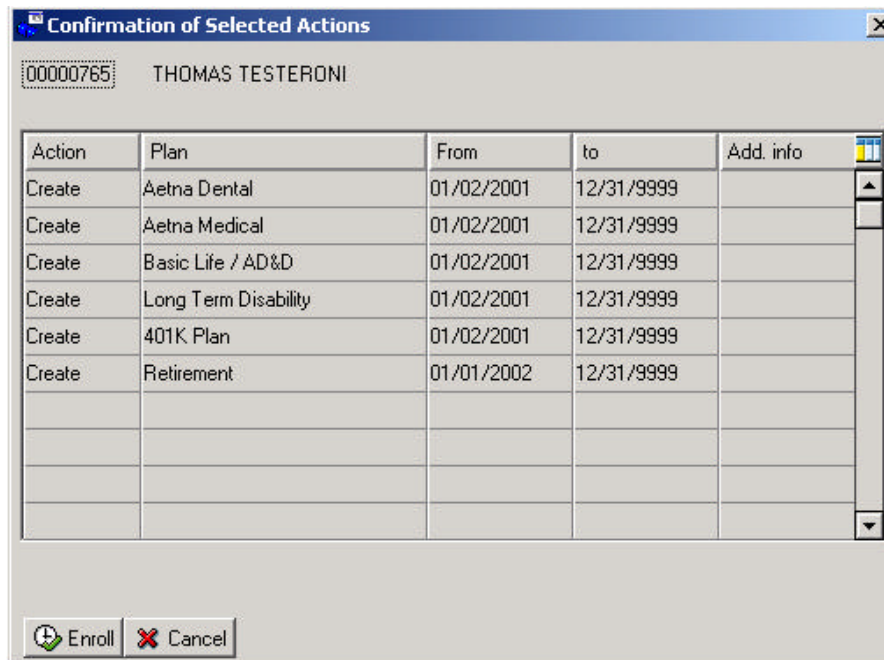
If the employee is married and the beneficiary is someone other than spouse, you must have written spouse approval. Enter the date the form was signed in the “Spouse’s approval” field.

Enter the percentage for each beneficiary, designate a contingent beneficiary by clicking the checkbox (if desired), then click the Accept  icon.

Notice that each time you finished a “**Benefit Enrollment**” and returned to the “**Enrollment Plan Selection**” screen, a green “check mark” appears to the right of each completed action.

When all the enrollment actions have been completed, click on the Enroll icon  on the applications toolbar.

You will now see a pop-up screen labeled **Confirmation of Selected Actions**. This window will show you a list of all the enrolled benefits and their effective dates.



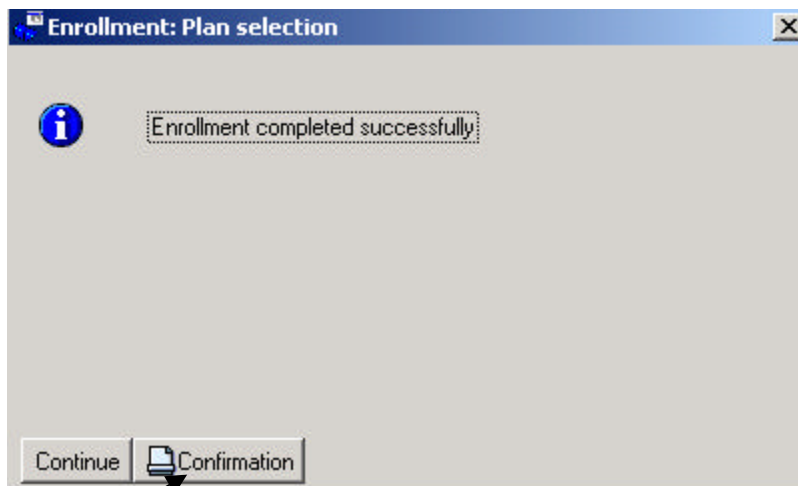
The screenshot shows a window titled "Confirmation of Selected Actions" for user THOMAS TESTERONI. It contains a table with the following data:

Action	Plan	From	to	Add. info
Create	Aetna Dental	01/02/2001	12/31/9999	
Create	Aetna Medical	01/02/2001	12/31/9999	
Create	Basic Life / AD&D	01/02/2001	12/31/9999	
Create	Long Term Disability	01/02/2001	12/31/9999	
Create	401K Plan	01/02/2001	12/31/9999	
Create	Retirement	01/01/2002	12/31/9999	

At the bottom of the window are two buttons: "Enroll" (with a green checkmark icon) and "Cancel" (with a red X icon). An arrow points to the "Enroll" button in the text below.



If all the information is correct, click on the Enroll pushbutton on the bottom of the pop-up window. If not, click Cancel, correct the entry and click Enroll again.

You will see another popup window verifying that the enrollment has been completed successfully.



At this point, if you are connected to a printer and the employee wants a printed confirmation of all the enrollments, click the Confirmation icon at the bottom of the window or if you are finished, click on the “Continue” button.



You are returned to the **Enrollment: Offers** screen. Select the  to return to the “Offer type for enrollment” screen to enroll another employee. Click the Exit icon  on the Standard toolbar to return to the **SAP Easy Access Screen**.



## Employee Changes to Benefit Coverage

When an employee has married, has a new child, divorces or has a change of circumstances that necessitate a change in some or all of his/her benefit coverage, this document describes the steps required to make the changes necessary to his/her benefits.

Only plans applicable to the life-changing actions may be modified. If the change involves adding new dependents, add them through infotype 0021 Family/Related person if applicable. If a dependent is no longer eligible, enter an End date to the record.

IF	THEN
The employee is involved in a position change or a transfer action	Access the system using the menu path: HUMAN RESOURCE > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS ( <b>See Step One</b> )
The employee has a life-changing action (i.e., Divorce, birth or adoption of a child, death of a spouse, etc.)	Access the system using the menu path: HUMAN RESOURCE > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > MAINTAIN Transaction Code: PA30 ( <b>See Step Two</b> )

**Step One:** You are completing the position change for an employee. This action can be used when an employee is changing from a benefit non-eligible position to an eligible one. Infotype 0378 - Adjustment Reasons will roll as the last infotype to complete. Once the personnel action has been completed, you can complete the Benefit Enrollment.

**Step Two:** This option will be used when an employee has a life-changing action of marriage, birth or adoption of a child, divorce or the death of a spouse or dependent. Making changes via the Master Data Menu.


### To Add a dependent

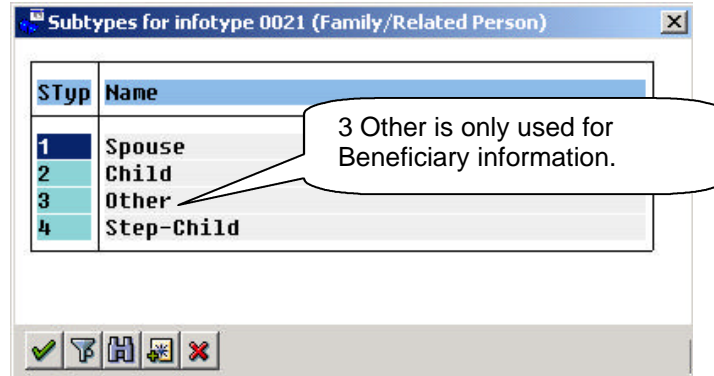
Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > MAINTAIN**

Transaction Code: **PA30**



Field Name	Description	R/O/C	User Action/Values
<b>Personnel Number</b>	Personnel number of the employee	R	Enter the personnel number of the employee, if known. Use the dropdown arrow to select in not known.
<b>Infotype</b>	The number of the infotype to be created	R	Enter the Infotype number into the Direct Selection field or click on Family Related Person. In our example we are entering infotype number 0021 – Family/Related Person.

After clicking the Create icon , you will be shown a pop-up window offering choices as to the type of dependent that you wish to add.



You double click on the selection or choose the subtype (i.e., spouse, child, other, etc.) and click the green check mark. For our example, we are choosing the subtype: Child.

*Screen: Infotype 0021 -Create Family/Related Person*

**Create Family/Related Person**

Infotype Edit Goto Extras System Help

Personnel no: 765 Name: THOMAS Status: Active

EE group: 5 NF Personnel ar: 1287 Northwest Region MWR

EE subgroup: FT Reg Full Time SSN: 414-95-7812

From: 02/07/2001 To: 12/31/9999

Family type: Child

**Personal data**

Last name: TESTERONI

First name: MARIO

Gender: ☐ Female ☒ Male

Birth date: 02/06/2001

SSN: 091-22-4456

Tel.no: 360 555-1212

Street: 123 FANTAIL DRIVE

City/state: SILVERDALE WA

Zip/country: 98315 US

**Physician**

Physician1: WALTER T WANGER

ID number: 25

Physician2:

ID number:

**Status**

☐ Student

☐ COBRA

☐ Medicare

☐ Smoker

**Challenge**




☐ Disability

Disab.date:

Learned:

The table below will describe the information that we have used to fill out the infotype correctly. In our example, we added a child as a dependent.

Field Name	Description	R/O/C	User Action/Values
<b>From date</b>	Effective date of the benefit	R	Enter the effective date. Leave the “To Date” as the default 12/31/9999
<b>Family type</b>	Relationship	R	This will default based on the subtype chosen on the pop-up window.
<b>Last Name</b>	Last name of the dependent or beneficiary	R	Enter the last name of the dependent
<b>First Name</b>	First name of the dependent or beneficiary	R	Enter the first name of the dependent
<b>Gender</b>	Male or Female	R	Check the radio button next to the correct choice
<b>Birth date</b>	Birth date of the dependent	R	Enter the birth date of the dependent. A beneficiary birth date is NOT required.
<b>SSN</b>	Social Security Number	R	Enter the Social Security Number of the dependent or beneficiary.
<b>Street/City/State/Zip/Country</b>	Permanent Address	R	Enter the address of the dependent or beneficiary
<b>Physician</b>	The dependent’s physician	R	Enter the Primary Care physician of the dependent
<b>ID Number</b>	Physician ID Number	R	Enter the ID number of the physician.
<b>Status</b>	Student	C	Required if dependent is over 19 years of age
<b>Challenge</b>	Whether the dependent is disabled/ handicapped.	C	Check if the dependent is disabled/ handicapped.

Press the enter key or the green check mark  to verify the accuracy of the entries and click the Save icon  to save the record. You may now use the  to return to the SAP Easy Access Menu.

### ***To Change dependent information:***

This option will be used when an employee has a life-changing action (e.g., divorce, death of a dependent, over-age dependent, etc.).

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > MAINTAIN**

Transaction Code: **PA30**

**Maintain HR Master Data**

HR master data Edit Goto Extras Utilities Settings System Help

Personnel no. **765**

Name **THOMAS TESTERONI**

EE group **5** NF Pers.area **1287** Northwest Region MWR

EE subgroup **FT** Reg Full Time Cost center **480** CHILD DEV EVE P...

Personal Data Addtl. Personal Data Benefit Information Taxes

Health Plans ☒ Insurance Plans ☒ Savings Plans ☒ General Benefits Information ☒ Adjustment Reasons ☒ Recur. Payments/Deds. ☐

**Period**

☒ Period Fr.  To

☐ Today ☐ Curr. week

☐ All ☐ Current month


☐ From curr. date ☐ Last week

☐ To current date ☐ Last month

☐ Curr. period ☐ Current year

**Direct selection**

Infotype **0021** STy

Click on the document Overview icon . This accesses the **List Family Related Person** screen as shown on the next page.

Click the box beside the name of the dependent that you wish to change. In our example, we have checked the box next to the spouse, Angelina Testeroni.

We now click the change icon 

You should now be at the screen titled “**Change Family Related Person**”.

Screen: Change Family Related Person

Change Family/Related Person

Infotype Edit Goto Extras System Help

Personnel no: 765 Name: THOMAS Status: Active

EE group: 5 NF Personnel id: 1287 Northwest Region MWR

EE subgroup: FT Reg Full Time SSN: 414-95-7812

From: 01/01/2001 To: 02/08/2001 Chng: 02/08/2001 HQ: P657F2

Family type: Spouse

**Personal data**

Last name: TESTERONI

First name: ANGELINA

Gender: ☒ Female ☐ Male

Birth date: 02/24/1958

SSN: 123-45-6789

Telno: 360 555-1212

Street: 123 FANTAIL DRIVE

City/state: SILVERDALE WA

Zip/country: 98315 US

Washington USA

**Physician**

Physician1: R.C. MCEWAN

ID number: 23

Physician2:

ID number:

**Status**

☐ Student

☐ COBRA

☐ Medicare

☐ Smoker

**Challenge**

☐ Disability

Disab.date:

Learned:

In the “To” field, as shown on the screen, change the field to reflect the date of the change (e.g., the divorce date).

Click the Enter key or the green check mark . You will receive a message stating the date of the record has been delimited. Enter again to accept the change.

Click on the Save icon .

You will now be back to the **List Family Related Person** screen. You may now use the green back arrow  to return to the **Maintain Master Data** screen.




**NOTE:** A time saving tip for processing a large number of these changes, would be to create/change all the dependents and/or beneficiaries for the employees before proceeding to the next step.

After creating and/or changing all dependents and/or beneficiaries, we must manually create infotype 0378 – Benefit Adjustment Reason.

This infotype will be required before attempting any enrollment into the benefit plans.

Field Name	Description	R/O/C	User Action/Values
<b>Personnel Number</b>	The employee's personnel number	R	Enter the Personnel number of the employee. If you do not know, click the down arrow and do a search based on the employee's social security number.
<b>Infotype</b>	The number of the infotype to be created	R	Enter the infotype – 0378 or click on the Benefit tab and click the box next to the Benefit Adjustment Reason.

Click on the Create icon  on the toolbar. You should now see the screen “**Create Adjustment Reason**”



**Create Adjustment Reasons**  
 Infotype Edit Goto Extras System Help

Personnel no: **765** Name: **THOMAS** Status: Active  
 EE group: **5** NF Personnel ar: **1287** Northwest Region MWR  
 EE subgroup: **FT** Reg Full Time SSN: **414-95-7812**  
 From: **02/08/2001** to: **12/31/9999**

Benefit area: **Navy (MWR)**  
 Adjustment reason: **Family Status Change**

**Deviation from end date**

Current end date: 12/31/9999  
 Calculated end date: 03/11/2001

Do you want to replace the current end date with the calculated end date?

Enter the information in the fields as specified on the table below.

Field Name	Description	R/O/C	User Actions/Values
<b>From date</b>	Effective date of the benefit change.	R	The field will default from the current date. Enter the effective date of the life-changing action (e.g. birth of a child), It must be within 31 days. Leave "To Date" as 12/31/9999.
<b>Benefit area</b>	Benefit area	R	This will default to Navy MWR and can not be changed.
<b>Adjustment Reason</b>	Reason for the life-changing action	R	Use the dropdown arrow to select <b>Family Status Change</b> or <b>HIPAA Certificate</b> . A pop-up window labeled " <b>Deviation from end date</b> " asks "Do you want to replace the current end date with the calculated end date?" Click on the <b>YES</b> button.



Click the Enter key or the green check mark . Save your entries by clicking on the Save icon .




**NOTE:** After creating/changing all dependents and/or beneficiaries (using infotype 0021) and the Benefit Adjustment Reason (using infotype 0378), use the menu path below to begin the Benefit Enrollment Process.

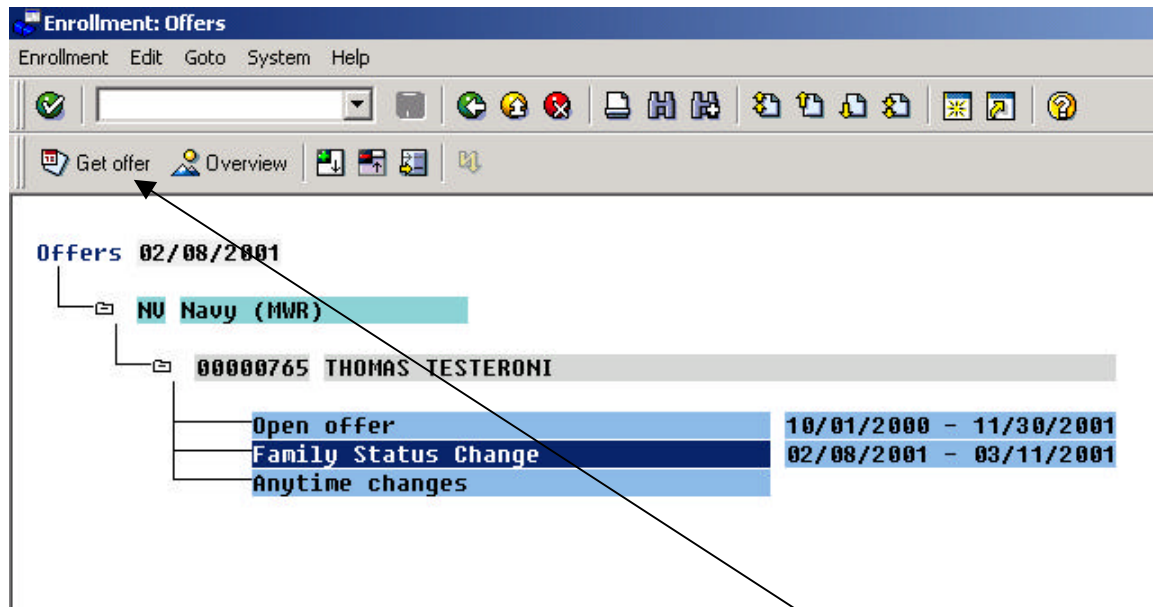
Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > BENEFITS > ENROLLMENT**

Transaction Code: **HRBEN0001**

Enter the information in the fields as specified in the table below:

Field Name	Description	R/O/C	User Action/Values
<b>Key date</b>	Effective date of the benefits	R	Enter the date of the effective benefit enrollment, either the date of the personnel action or the date of the life-changing action.
<b>Selection</b>	Personnel number	R	Enter the employee's personnel number or use the dropdown arrow to select.

Click the Execute icon  to open the screen labeled **“Enrollment Offers”**



Highlight the line “**Family Status Change**” and click on the “**Get offer**” pushbutton on the toolbar, or highlight “**Family Status Change**” and double click on it.

You are now at the “**Enrollment: Plan Selections**” screen.

00000765 THOMAS TESTERONI		
Offer as of	02/09/2001	New enrollment dates
<b>Dental</b>		
Aetna Dental		
Standard Insurance Dental		
<b>Medical</b>		
Aetna Medical		
HMO Cigna Medical		
HMO Grouphealth		
HMO KPS		
<b>Basic Life/AD&amp;D</b>		
Basic Life / AD&D		
<b>401(k)</b>		
401K Plan		
<b>Retirement</b>		
Retirement		




**NOTE:** The screen above lists all the plans in which the employee is currently enrolled (marked by a green circle) and which may be changed based on the adjustment reason. You may now start the enrollment change process. Only applicable changes can be made.

The process to change is essentially the same as the process for the original enrollment.

The screenshot shows a software window titled "Maintain Health Plan". At the top, there are three input fields: "Pers.no." with the value "765" and the name "THOMAS TESTERONI", "Plan" with the value "Aetna Medical", and "From" with the date range "02/08/2001 - 12/31/9999". Below these fields is a checkbox labeled "Stop participation in period" which is currently unchecked. There are two tabs, "Option" and "Dependents", with "Dependents" being the active tab. Below the tabs is a table with three columns: "Select.", "Name", and "Type of dep./ben.". The table contains two rows: one for "ANGELINA TESTERONI" (Spouse) with an unchecked checkbox, and one for "MARIO TESTERONI" (Child) with a checked checkbox. At the bottom of the window, there are two buttons: "Accept" (with a green checkmark icon) and a button with a red X icon.

Select.	Name	Type of dep./ben.
<input type="checkbox"/>	ANGELINA TESTERONI	Spouse
<input checked="" type="checkbox"/>	MARIO TESTERONI	Child

Field Name	Description	R/O/C	User Action/Values
<b>Option folder tab</b>	To select the option of medical coverage	R	Option field will default with the chosen plan and cannot be changed.
<b>Dependent Coverage</b>	To select appropriate coverage	R	Click on the dropdown arrow and select the type of coverage preferred. (Family, Employee Only, Single, etc.) You will note that the employee cost will appear.
<b>Dependents folder tab</b>	Dependents to be covered	R	Click on the tab to open the folder. Click on the button to the left of each dependent(s) you are enrolling in coverage or removing from the plan. Clicking to remove the check mark deletes the dependent. Note: if there are no dependents, this tab will not be visible.


An illustration of how the process works is shown on the Maintain Health Plan window above. We have removed the check mark from the select field shown to the left of the named dependent for the line with the Name “Angelina Testeroni” on it. This will remove coverage for Angelina because of the divorce. Click the Accept icon  on the bottom of the window.

We return to the **Enrollment Plan Selection** screen again.

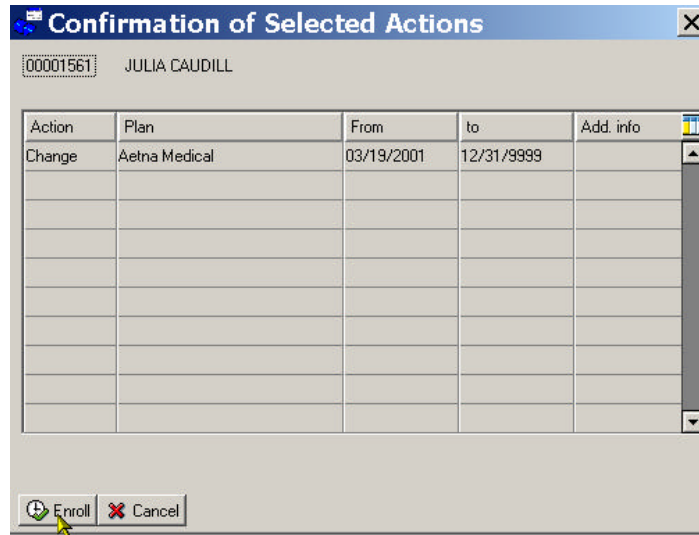
Continue to **highlight** and **double click** on any of the indented plans for which you wish to make changes. The only changes that you will be allowed to make to the following insurance plans will be to the beneficiaries.


- Basic Life/AD&D Insurance
- Optional Life
- Long Term Disability
- 401K Savings Plan
- Retirement

Notice that each time you finished a “**Benefit Enrollment**” and returned to the “**Enrollment Plan Selection**” screen, a “check mark” appears to the right of each completed action.

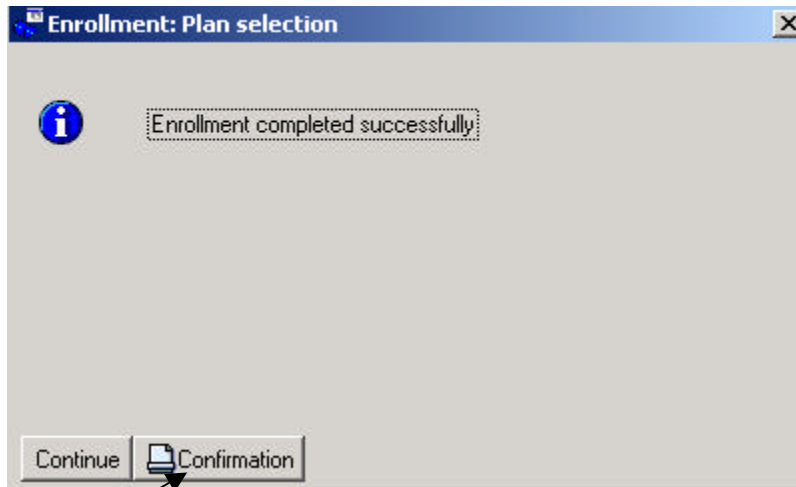
When all the enrollment actions have been complete, click on the Enroll icon  on the applications toolbar.

You will now see a pop-up screen labeled **Confirmation of Selected Actions**. This window will show you a list of all the enrolled benefits and their effective dates.



If all the information is correct, click on the Enroll pushbutton  on the bottom of the pop-up window.

You will see another popup window verifying that the enrollment has been completed successfully.



At this point, if you are connected to a printer and the employee wants a printed confirmation of all the enrollments, click the Confirmation icon at the bottom of the window or if you are finished, click on the “Continue” button.

You may continue on with another employee or, if you are finished, click on the Exit icon



on the standard toolbar to return to the SAP Easy Access menu.

### ***Printing a HIPAA Certificate:***

If there is a need to print a Health Insurance Portability & Accountability Act (HIPAA) certificate, follow these steps:


Menu path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > BENEFITS > FORMS > HIPAA certificate report**

After using the various report options as described in the chapter titled Reports, we decided to print only the HIPAA certificate for Personnel ID Number 765. Click the



Execute icon. You will be reminded to specify an Output Device (Printer) before the report will be displayed.

**Print:**

Output device:    
 HQ Comp Svcs in HR War Room

Number of copies:

Page selection:

---

**Spool request**

Name:

Title:

Authorization:

---


**Output options**

☐ Print immediately


☐ Delete after print

☐ New spool request

Spool retention per.:  Day(s)

Archiving mode:  




**Cover page**



Recipient:

Department:

---

 Print preview  Print  Cancel

We clicked the Print preview icon to receive the following excerpt from the HIPAA certificate.

## Certificate of Creditable Coverage (HIPAA)

**Date certificate issued:** 02/09/2001

**IMPORTANT:** This certificate provides evidence of your prior health coverage. You may need to furnish this certificate if you become eligible under a group health plan that excludes coverage for certain medical conditions. This certificate can be provided if medical advice, diagnosis, care or treatment was recommended or received for the condition within the 6-month period prior to your enrollment in the new plan. You may also need this certificate to buy for yourself or your family an insurance policy that does not exclude coverage for medical conditions before you enroll.

**Person certified:**

<b>Name:</b> TESTERONI, THOMAS		<b>SSN:</b> 414957812	
<b>Street address:</b> 122 MAIN STREET			
<b>City:</b> MEMPHIS	<b>State:</b> TN	<b>Zip:</b> 38133	
<b>Country:</b> US			
<b>Relationship of certified person to employee:</b> SELF			
<b>Emp. Name:</b> TESTERONI, THOMAS		<b>SSN:</b> 414957812	



## Employee Benefit Termination

This procedure will outline, in detail, the steps required to remove a terminated employee from the Benefit Plans for which he had been eligible.

Use the following menu path to begin the process.

Menu path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > BENEFITS > TERMINATION**

Transaction Code: **HRBEN0014**

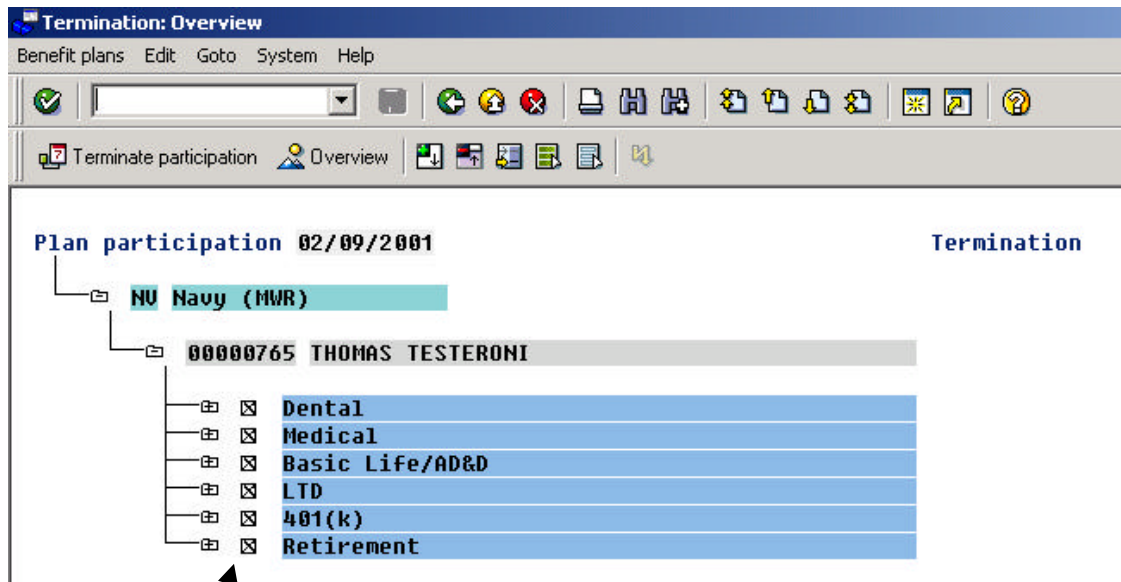
Field Name	Description	R/O/C	User Action/Values
<b>Key date</b>	Date benefits are to be terminated—termination of benefits date <b>MUST</b> be the first day of the pay period that deductions are to stop	R	The “Today” button will be depressed. If benefits are to be terminated at a different date, depress the button to the left of “Other keydate” and enter the date benefits are to be terminated into the input field.
<b>Selection</b>	Personnel Number	R	Enter the Personnel number of the employee whose benefits are being terminated.

Click on the Execute icon




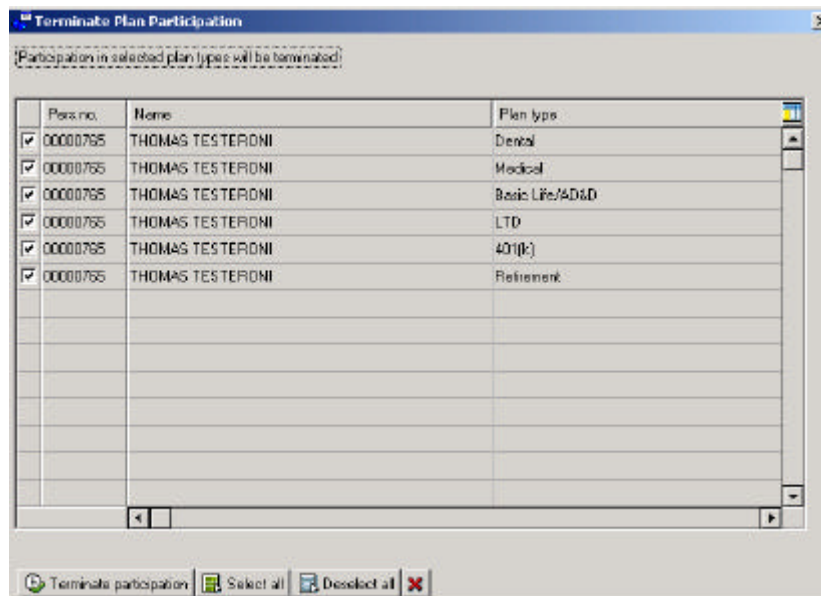
You will see the next screen: Termination Overview






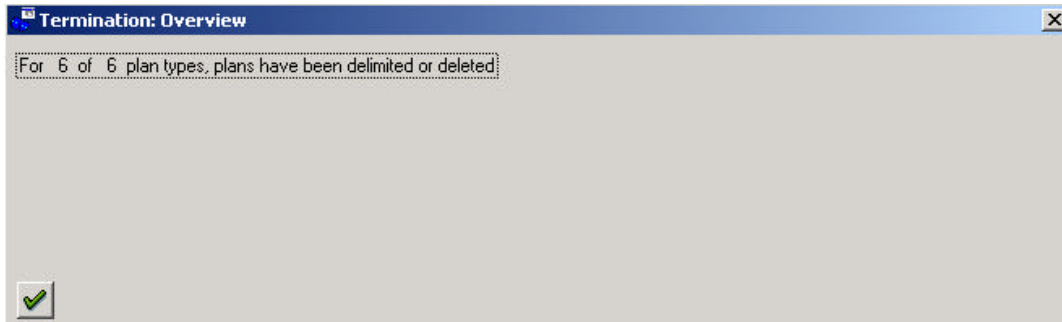
The screen gives you a listing of all the plans in which the employee is currently enrolled.

- If terminating all the benefit plans an employee is currently enrolled in, click on the **Select all** icon  and all the small indicator boxes to the left of the plans are checked.
- If you are terminating an individual plan, click on the empty box to the left of the individual plans.
- A window will open verifying selected plans to be terminated.



Click on the **Terminate participation** pushbutton  on the bottom of the window.

Another window will open with the message “For XXX of XXX plan types, plans have been delimited or deleted”



Click on the green check mark at the bottom of the window. The window will close and the benefit plans checked have been terminated as of the effective date entered.

We have expanded the entire Benefit Plan tree to show that each of the plans now has a termination date next to it. See the screen as shown on the next page.

**Termination: Overview**  
 Benefit plans Edit Goto System Help

Terminate participation Overview

**Plan participation 02/09/2001** **Termination**

**NU Navy (MWR)**

**00000765 THOMAS TESTERONI**

**Dental**

Aetna Dental 01/02/2001 - 02/09/2001 02/09/2001

**Medical**

Aetna Medical 01/02/2001 - 02/09/2001 02/09/2001

**Basic Life/AD&D**

Basic Life / AD&D 01/02/2001 - 02/09/2001 02/09/2001

**LTD**

Long Term Disability 01/02/2001 - 02/09/2001 02/09/2001

**401(k)**

401K Plan 02/08/2001 - 02/09/2001 02/09/2001

**Termination dates**

## Print a Confirmation of Termination Form

You can print a confirmation of the Termination of Employee Benefits. Follow these steps:

### HR>PM>BENEFITS>FORMS>CONFIRMATION

Print Confirmation Letter (Tree Structure)

Program Edit Goto System Help

Further selections Search helps Org. structure

**Period**

☒ Today ☐ Current month ☐ Current year

☐ Up to today ☐ From today

☐ Other period

**Selection**


Personnel number 755 to

DV2 (1) (200) mwrsp5 INS 10:33

Enter the date benefits were termination and the personnel number.

Click the Execute icon .

This confirmation will show the termination dates and applicable benefits plans.

The termination process has been completed. Use the Exit icon  to return to the SAP Easy Access screen. If there is a need to print a HIPAA certificate, follow these instructions:

1. In the command field, enter /NTHIPAA. Press the Enter key or click the green check mark.
2. You are at the HIPAA Log of Issued Certificates screen. Click on the Issue cert. push button. You will be shown the HIPAA Certificate report screen. Follow the guidelines from the previous chapter.
3. Enter the individual personnel number of run multiple ones by following the general report methods and techniques.



## Rehire Employee Benefit Enrollment

This procedure will outline, in detail, the steps required to enroll a **rehired** employee into the benefit plans for which they are eligible.

Use the following menu path to begin the process.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > MAINTAIN**

Transaction code: **PA30**

We have entered a Personnel ID number in the Direct selection part of the window, and the infotype that we wish to create, in this case, infotype 9003 – Retirement Plan Data at Termination.

**This step is critical for an employee in order to capture the information that is on the retirement application concerning previous retirement information.**



Click the Create Icon on the toolbar.

**Create Retirement Plan Data at Termination**

Infotype Edit Goto Extras System Help

Personnel no **765** Name **THOMAS** Status **Active**

EE group **5** NF Personnel ar **1287** Northwest Region MWR

EE subgroup **FT** Reg Full Time SSN **414-95-7812**

From **02/08/2001** to **12/31/9999**

**BUPERS or other NAFI Retirement Plans**

Previous Participation in Plan **N**


If Yes, Retirement Plan Option **N/A**

If Discontinue, Date

Field Name	Description	R/O/C	User Action/Values
<b>From Date</b>	The starting date of the plan enrollment	R	Enter the Starting date or use the dropdown arrow to select
<b>To Date</b>	The end date of the employee participation	R	The field will default to 12/31/9999. <b>Do Not Change</b>
<b>Previous participation in plan</b>	Were they in the plan before?	R	Enter Y or N to answer whether the employee was in the plan before
<b>If Yes, Retirement plan option</b>	User defined	C	If the answer to the previous question was Yes, use the dropdown arrow to select the appropriate answer from the following choices: A – Cash Surrender B – Paid up Annuity D – Discontinue
<b>If discontinue, Date</b>	User defined	C	If the answer to the previous question was “Discontinue”, you must enter the date of the discontinuance. A Retirement Plan deduction may be stopped by the employee at any time voluntarily.

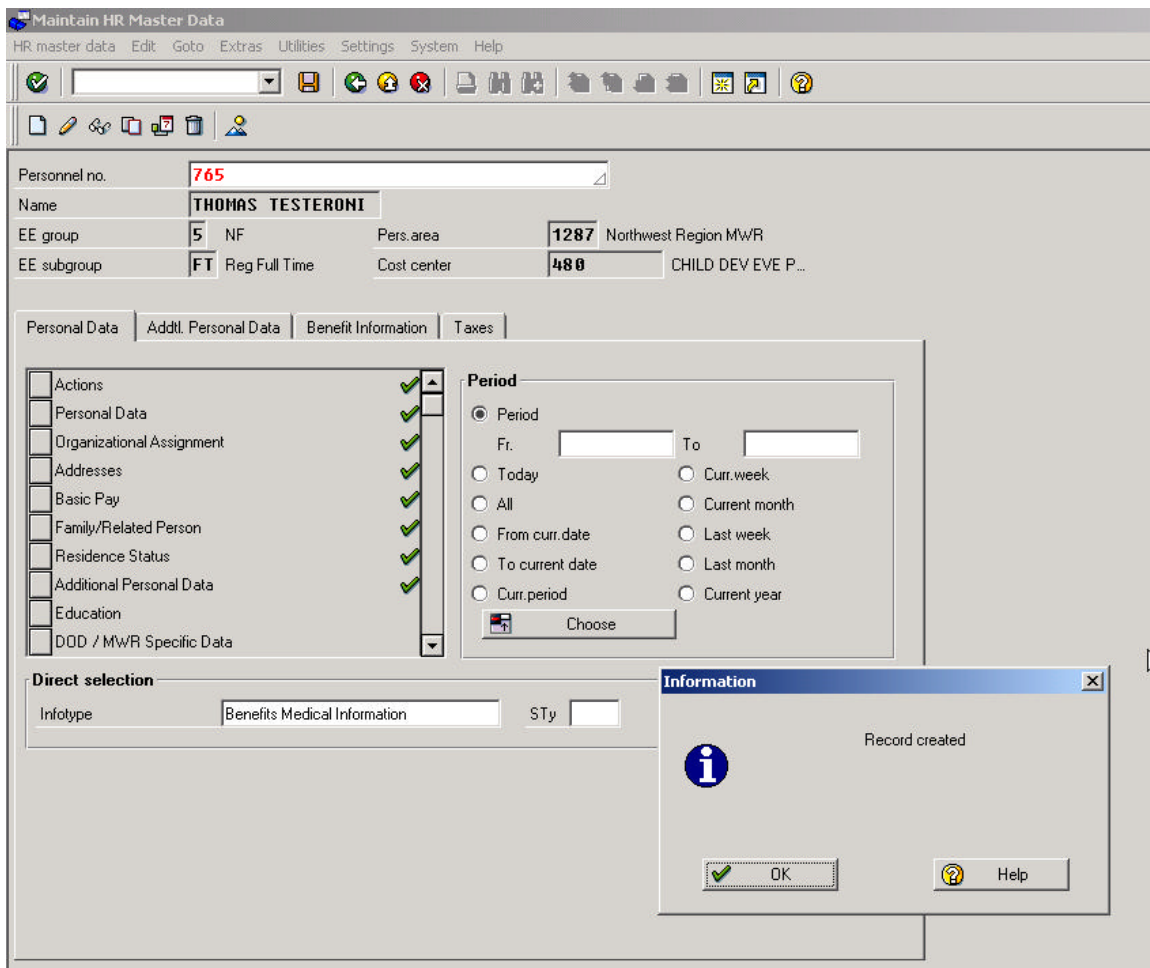
When the inputs are correct, click the Enter icon



You will be reminded to save your entries. Do so by clicking on the Save icon .

The second of the three infotypes to be manually created is infotype 0376 – Benefits Medical Information. This is where the employee's physician name and other related information is stored.

The number 0376 is entered directly into the infotype field in the Direct selection part of the window as we have done with the first infotype.



The screenshot shows the 'Maintain HR Master Data' application window. The 'Direct selection' section at the bottom has the 'Infotype' field set to 'Benefits Medical Information'. An 'Information' dialog box is open in the bottom right corner, displaying 'Record created' and 'OK'/'Help' buttons.


**Personnel no.** 765  
**Name** THOMAS TESTERONI  
**EE group** 5 NF **Pers. area** 1287 Northwest Region MWR  
**EE subgroup** FT Reg Full Time **Cost center** 480 CHILD DEV EVE P...

**Period**  
☒ Period  
Fr.  To   
☐ Today ☐ Curr. week  
☐ All ☐ Current month  
☐ From curr. date ☐ Last week  
☐ To current date ☐ Last month  
☐ Curr. period ☐ Current year

**Direct selection**  
**Infotype** Benefits Medical Information **STy**

**Information**  
Record created



Click the Create icon  again to open the following pop up window.

**Create Benefits Medical Information**

infotype Edit Goto Extras System Help

Personnel no **765** Name **THOMAS** Status Active

EE group **5** NF Personnel ar **1287** Northwest Region MWR

EE subgroup **FT** Reg Full Time SSN **414-95-7812**

From **02/08/2001** to **12/31/9999**

**Doctors**

Physician name **Travis C. Travis**

Physician ID **ABC12345**

Physician name

Physician ID

Physician name



Physician ID

**State of health**

☐ Smoker

At the Create Benefits Medical Information screen, the following inputs are required.

Field Name	Description	R/O/C	User Action/Values
<b>From</b>	Date of the benefit enrollment	R	Enter the begin date of the enrollment
<b>Physician's Name</b>	Name of the Primary Care Physician	R	Enter the Primary Care Physician
<b>Physician ID</b>	ID Number of the Primary Care Physician	R	Enter the ID Number


Click the enter icon  to validate the entries and the click the Save icon  to save the transaction.

**NOTE:** The physician is only used for initial enrollment into SAP. The physician name will be maintained with the provider from that point on.

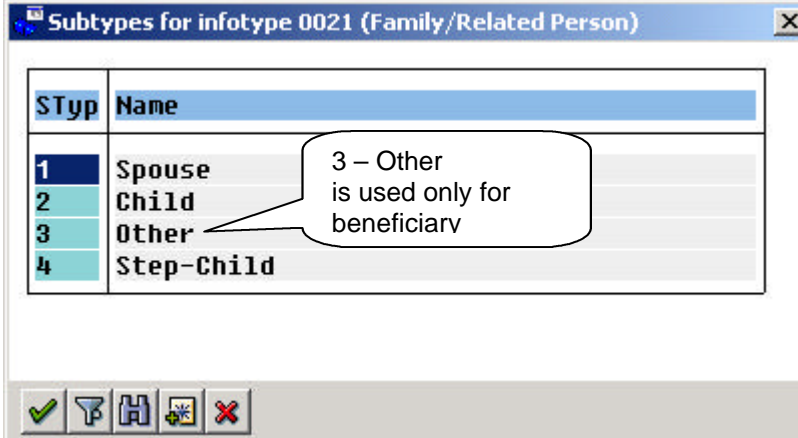


All dependent information will be kept in SAP except the physician information. Any Add, Change or Stopping of dependents will go through the Human Resources module.

The initial beneficiary must be in SAP, but changes to an existing beneficiary will be done by the provider.

The third and final of the manually entered infotypes is 0021 – Family/Related Person. Directly enter infotype 0021 into the field as we have done for the two previous infotypes and click the Create icon .

With this infotype, you will see an interim pop-up window asking for additional information as shown below.



The dialog box titled "Subtypes for infotype 0021 (Family/Related Person)" contains a table with two columns: "STyp" and "Name". The table lists four subtypes: 1 Spouse, 2 Child, 3 Other, and 4 Step-Child. The "1 Spouse" row is highlighted. A callout box points to the "3 Other" row with the text "3 – Other is used only for beneficiary". At the bottom of the dialog box is a toolbar with five icons: a green checkmark, a funnel, a house, a document with a plus sign, and a red X.

STyp	Name
1	Spouse
2	Child
3	Other
4	Step-Child

Choose the Family/Related person that we are creating the infotype for. In the example that we are using, we highlight 1 – Spouse and click the green check mark.

**Display Family/Related Person**  
 Infotype Edit Goto Extras System Help

Personnel no: 765 Name: THOMAS Status: Active  
 EE group: 5 NF Personnel ar: 1287 Northwest Region MWR  
 EE subgroup: FT Reg Full Time SSN: 414-95-7812  
 From: 01/01/2001 To: 12/31/9999 Chng: 02/08/2001 HQ\_P657F2

Family type: Spouse

**Personal data**

Last name: TESTERONI  
 First name: ANGELINA  
 Gender: ☒ Female ☐ Male  
 Birth date: 02/24/1958  
 SSN: 123-45-4454 Tel.no: 360 555-1212  
 Street: 123 FANTAIL DRIVE Sep. date:  
 City/state: SILVERDALE WA Washington  
 Zip/country: 98315 US USA

**Physician**

Physician1: R.C. MCEWAN  
 ID number: 23  
 Physician2:  
 ID number:

**Status**



☐ Student  
☐ COBRA  
☐ Medicare  
☐ Smoker

**Challenge**

☐ Disability  
 Disab.date:  
 Learned:

Field Name	Description	R/O/C	User Actions/Values
<b>From Date</b>	Effective date of the benefit enrollment	R	Enter the effective date and leave the "To Date" as 12/31/9999"
<b>Family type</b>	Relationship	R	This field will be defaulted based on the subtype chosen in the pop-up window menu
<b>Last Name</b>	Last name of the beneficiary or dependent	R	Enter the last name.
<b>First Name</b>	First name of the beneficiary or dependent	R	Enter the first name
<b>Gender</b>	Female or male	R	Click the radio button next to the correct selection
<b>Birth Date</b>	Birth date of dependent. Birth date of beneficiary not required	R	Enter the birth date as required.

<b>SSN</b>	Social Security Number	R	Enter the Social Security Number of the dependent or beneficiary
<b>Street/City/State Zip/Country</b>	Permanent Address	R	Address of the dependent or beneficiary
<b>Physician</b>	Physician of the dependent	R	Enter the Primary Care Physician of the dependent
<b>ID Number</b>	Physician ID number	R	Enter the dependent's Primary Care Physician ID Number.
<b>Status</b>	Student	C	Required if dependent is over 19 years of age
<b>Challenge</b>	Whether the dependent is disabled/ handicapped.	C	Check if the dependent is disabled/ handicapped.

Once the screen is completed, Click the enter icon  to validate the entries and the click the Save icon  to save the transaction.

After completing all the dependents and/or beneficiaries, follow the menu path or transaction code to begin the actual Benefit Enrollment process. (See next page.)




## Rehire Benefit Enrollment

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > BENEFITS > ENROLLMENT**

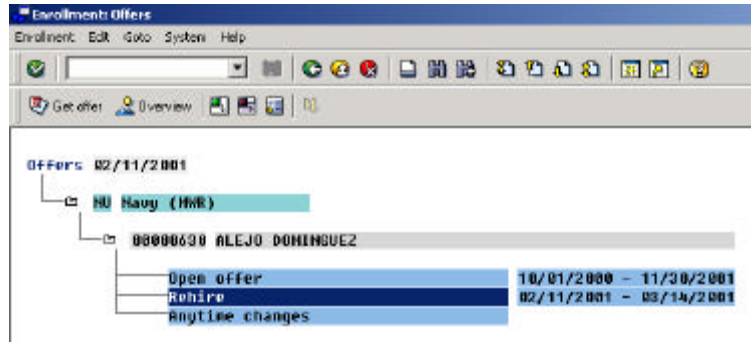
Transaction Code: **HRBEN0001**

You will see the opening screen, Offer Type for Enrollment. Enter information into the field(s) as specified in the table below the screen picturization.

Field Name	Description	R/O/C	User Action/Values
<b>Key Date</b>	Effective date of the benefits	R	<p>If you are enrolling the newly rehired employee in the current date, the button to the left of “Today” is depressed, no input is required. If you are enrolling at a later date, depress the button next to “Other keydate”, tab to the input field and enter the effective date as MM/DD/YYYY.</p> <p><b>This date must be the date the employee signed the forms.</b></p> <p>Enrollment MUST be within 31 days of the rehire date.</p>
<b>Selection</b>	Personnel Number	R	<p>Enter the Employee’s personnel number, if known. Use the dropdown arrow to aid in the selection if the Personnel Number is not known.</p>

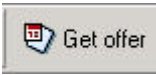
Click the Execute icon .

You now will be shown the “Enrollment Offers” screen.



**NOTE:** Employee must have an existing infotype 0378 – Adjustment Reasons infotype which will be created during the rehire action.

You may access the next screen using either of these two methods:

- Highlight the **Rehire** line and click on the Get Offer icon  on the Application toolbar.
- Highlight the **Rehire** line and double click.

You will now be at the screen labeled “**Enrollment: Plan Selections**”

This screen, partially shown here, lists all the plans in which the employee is eligible to enroll at this time.

00000630 ALEJO DOMINGUEZ

Offer as of 02/11/2001

- ☐ Dental
  - ☐ Aetna Dental
  - ☐ Standard Insurance Dental
- ☐ Medical
  - ☐ Aetna Medical
  - ☐ HMO Cigna Medical
  - ☐ HMO Grouphealth
  - ☐ HMO KPS

**Highlight and double click on the indented plan in which you are enrolling the employee.**

We have highlighted and double clicked on Aetna Dental to illustrate the process. You will now see a pop-up window named Maintain Health Plan. Enter and check the information as specified in the table below.

Field Name	Description	R/O/C	User Action/Values
<b>Option folder</b>	To select plan and dependent coverage	R	Click on the dropdown arrow by the dependent coverage field to choose the coverage.
<b>Dependent folder</b>	Dependents to be covered	R	Click the Dependent folder to open. Click the button next to the dependent name as shown on the screen below.

Pers.no. 630 ALEJO DOMINGUEZ

Plan Aetna Dental

From 02/12/2001 - 12/31/9999

☐ Stop participation in period

Option Dependents

Select.	Name	Type of dep./ben.
<input checked="" type="checkbox"/>	MARIA DOMINGUEZ	Spouse
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Accept

Click on the Accept icon on the bottom of the pop-up window and the window will close.

You will return to the 'Enrollment Plan Selection' screen.

- **Highlight** and **double click** on the indented plan in which you are enrolling the employee.

We have highlighted and double clicked on the Aetna Medical Plan.

The screen below shows the first tab of the Maintain Health Plan for the Aetna Medical Plan selection. We have used the dropdown arrow to select Family coverage and the system calculated the bi-weekly cost to the employee as shown on the window.



**Maintain Health Plan**

Pers.no. **630** ALEJO DOMINGUEZ

Plan **Aetna Medical**

From **02/12/2001** - **12/31/9999**

☐ Stop participation in period

Option | Dependents

**Plan options**

Option **Aetna Med -POS**

Dependent cov. **Family**

**Costs USD Bi-weekly**

Employee	<b>75.00</b>	<input checked="" type="checkbox"/> Deduct pre-tax
Employer	<b>0.00</b>	

Accept

After checking and verifying the entries on the first tab, we click on the Dependents tab.

**Maintain Health Plan**

Pers.no. **630** ALEJO DOMINGUEZ

Plan **Aetna Medical**

From **02/12/2001** - **12/31/9999**

☐ Stop participation in period

Option | Dependents

Select.	Name	Type of dep./ben.
<input checked="" type="checkbox"/>	MARIA DOMINGUEZ	Spouse

Accept

We have clicked the Select box next to the name of the spouse to enroll her and then click on the **Accept** icon on the bottom of the pop-up window and the window closes.

We have gone through the process for one more of the eligible plans to illustrate the process. We have chosen the Retirement plan although we haven't shown the input screens.



**NOTE:** You must verify eligibility for retirement enrollment based on the eligibility criteria. This enrollment date is based on the information stored in Infotype 0041 – Date Specifications for Retirement Plan Eligibility.

This now finishes all the available selections. You have returned to the **Enrollment Plan Selection** screen. Notice that each time you finished a “Benefit Enrollment” and returned to this screen, a check mark appeared to the left of the completed action.

**Enrollment: Plan selection**

Plan Edit Goto System Help

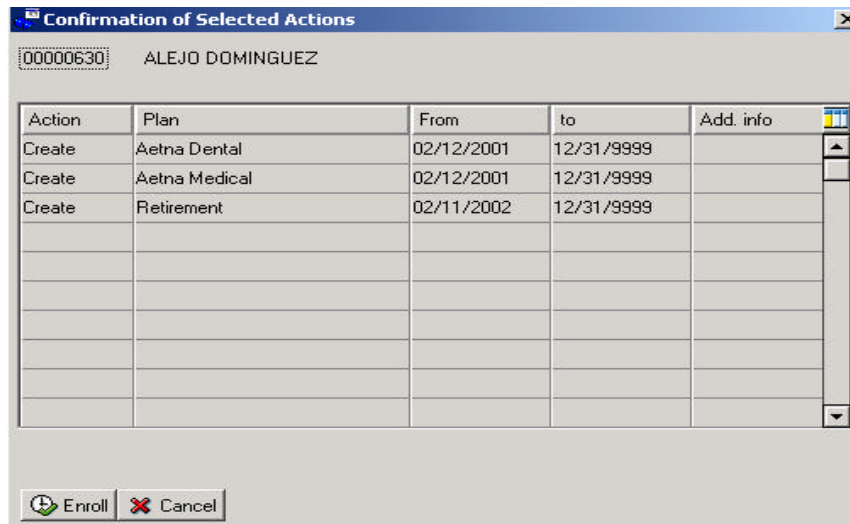
Enroll [Icons]

00000630 ALEJO DOMINGUEZ

Offer as of	02/12/2001	New enrollment dates
<b>Dental</b>		
Aetna Dental	02/12/2001 - 12/31/9999	✓
Standard Insurance Dental	02/12/2001 - 12/31/9999	
<b>Medical</b>		
Aetna Medical	02/12/2001 - 12/31/9999	✓
HMO Cigna Medical	02/12/2001 - 12/31/9999	
HMO Grouphealth	02/12/2001 - 12/31/9999	
HMO KPS	02/12/2001 - 12/31/9999	
<b>Retirement</b>		
Retirement	02/11/2002 - 12/31/9999	✓

Now that the enrollment actions have been completed, click on the Enroll icon on the Applications toolbar.

- You will now see a screen titled “**Confirmation of Selected Actions**”. This screen shows you a list of the benefits and the effective dates for this employee.

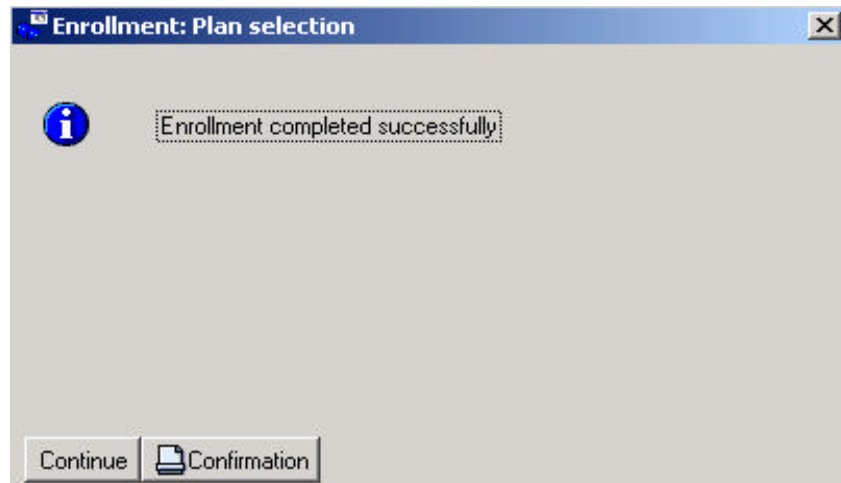


The screenshot shows a window titled "Confirmation of Selected Actions" for employee ALEJO DOMINGUEZ (ID: 00000630). It contains a table with the following data:


Action	Plan	From	to	Add. info
Create	Aetna Dental	02/12/2001	12/31/9999	
Create	Aetna Medical	02/12/2001	12/31/9999	
Create	Retirement	02/11/2002	12/31/9999	

At the bottom, there are "Enroll" and "Cancel" buttons.

- If the information is correct, click on the **Enroll** icon on the bottom of this pop-up window. You will now see another window verifying that the enrollment was completed successfully as shown below.



The screenshot shows a window titled "Enrollment: Plan selection" with an information icon and the message "Enrollment completed successfully". At the bottom, there are "Continue" and "Confirmation" buttons.

- If you are connected to a printer and want a printed confirmation, click on the Confirmation icon on the bottom of the window or if you are finished, click on the Continue icon to return to the “**Enrollment: Offers**” screen.
- You may continue to enroll another employee or if you are finished Benefit Enrollment transactions, click the Exit icon  found on the Standard Toolbar to return to the SAP Easy Access screen.



### Retiree Benefit Enrollment

This procedure will outline, in detail, the steps required to enroll a **retired** employee into the benefit plans for which they are eligible. This process is **ONLY** for an employee who is in retirement status.

If an employee decides to leave MWR after they are vested into the Retirement system but before they are age-eligible, **and** they leave their money in the system, they can come back for retirement. However, because of the gap in the work history, this type of employee is **NOT** eligible for the free Life Insurance and the Health plans.

Use the following menu path to begin the Retire Benefit Enrollment process.

Menu path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > BENEFITS > ENROLLMENT**

Transaction Code: **HRBEN0001**

Enter information in the field(s) as specified in the table on the next page:

Field Name	Description	R/O/C	User Action/Values/Comments
<b>Key date</b>	Effective date of the benefits	R	If you are enrolling the newly retired employee in the current date, the button to the left of “Today” is depressed, no input is required. If you are enrolling at a later date, depress the button next to “Other keydate”, tab to the input field and enter the retirement date as MM/DD/YYYY. <b>This date must be the date the employee signed the forms.</b> Enrollment MUST be within 31 days of retirement.
<b>Selection</b>	Personnel Number	R	Enter the retiree’s Personnel Number or use the dropdown arrow to aid in the selection.

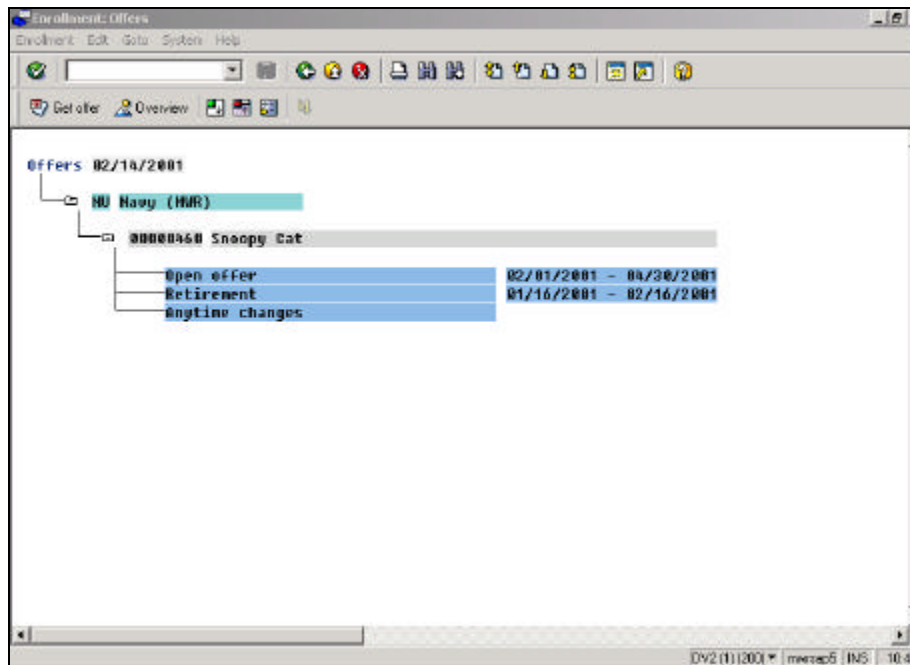
Click on the Execute icon on the Application toolbar.

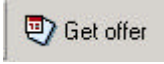


You are now at the screen titled “Enrollment: Offers” as shown below.

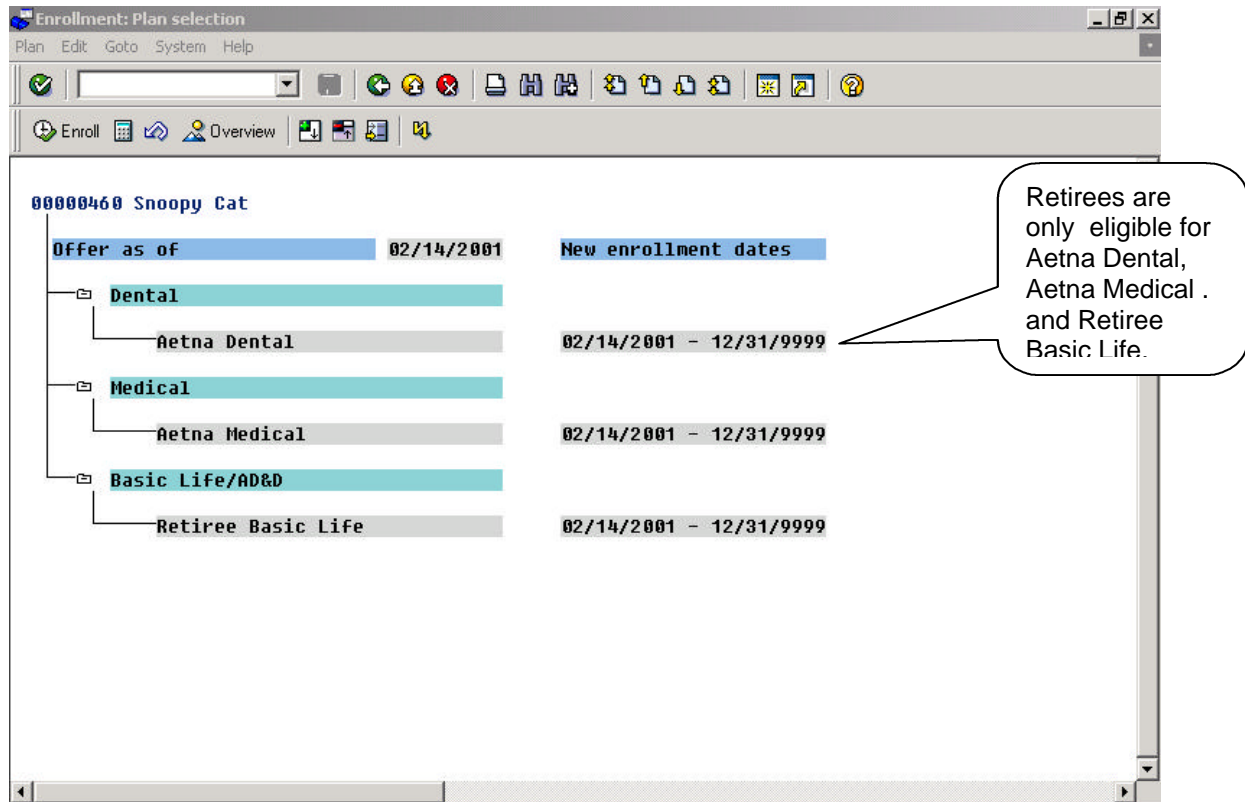


**NOTE:** Retiree must have an existing infotype 0378 record that will be created during the retirement process.



- Highlight **Retirement** and **click** on the Get Offer  icon on the Application toolbar.
- Highlight **Retirement** and **double click**.

You will now be at the screen labeled “**Enrollment: Plan Selections**”.



The screen above lists all the plans in which the retired employee is eligible to enroll.

- **Highlight** and **double click** on the indented plan in which you are enrolling the retiree.

In our example, we are **highlighting** and **double clicking** on the **Aetna Dental** line. The popup screen named “Maintain Health Plan” appears.

Maintain Health Plan

Pers.no. 460 Snoopy Cat

Plan Aetna Dental

From 02/14/2001 - 12/31/9999

☐ Stop participation in period

Option Dependents

**Plan options**


Option Aetna Dental

Dependent cov. Employee Only

**Costs USD Bi-weekly**

Employee	3.00	<input checked="" type="checkbox"/> Deducts pre-tax
Employer	0.00	

Accept Cancel

This is the first of a number of very similar screens that allow verification and acceptance of the Enrollment offers. After verifying the entries, click on the Accept icon  on the bottom of the pop-up window to return to the selection process.

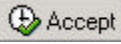
- **Highlight** and **double click** on the next indented plan in which you are enrolling the retiree.

In our example, we are **highlighting** and **double clicking** on the **Aetna Medical** line. The popup screen named “Maintain Health Plan” appears.



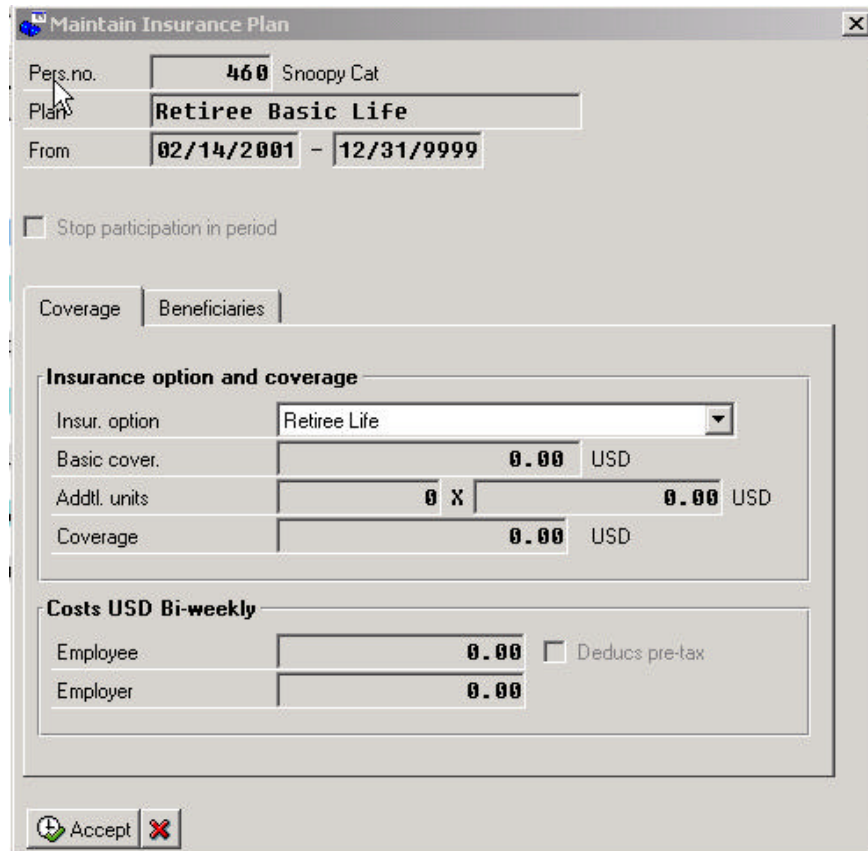
Enter and check the information on the screen above according to the guidelines in the table below:

Field Name	Description	R/O/C	User Actions/Values/Comments
<b>Option folder</b> <b>Option</b>	To select the option of the medical coverage	R	Click on the dropdown arrow and select the appropriate option, if applicable.
<b>Dependent Coverage</b>	To select the appropriate coverage	R	Click on the dropdown arrow and select the type of coverage elected (Family or Employee Only) Employee cost will automatically appear.
<b>Dependent Folder</b>	Dependents to be covered	R	Click on the Dependent folder to open. Click on the small input box to the left of the dependent's name to include them in the coverage. (NOTE: If there are no dependents, this folder tab will not be on the screen).

Click the Accept icon  on the bottom of the window and you will return to the “Enrollment Plan Selection” screen.

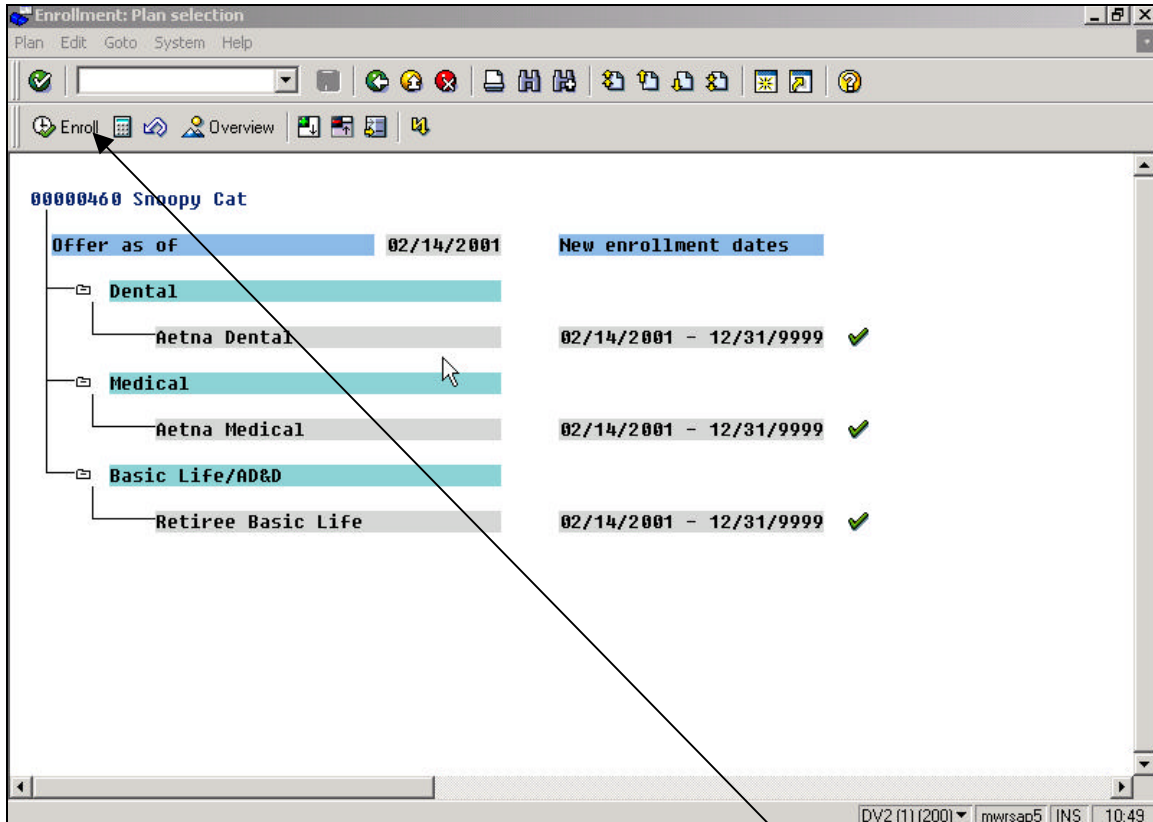
- **Highlight** and **double click** on the next indented plan in which you are enrolling the retiree.

In our example, we are **highlighting** and **double clicking** on the **Retiree Basic Life** line. The popup screen named “Maintain Insurance Plan” appears.



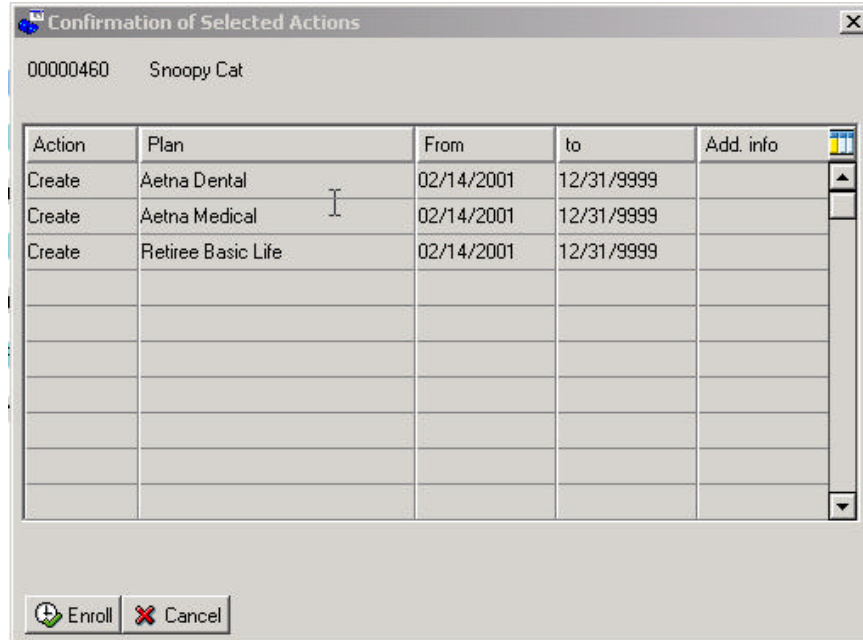
Folder Tab Name	Description	R/O/C	User Action/Values/Comments
<b>Coverage Folder</b>	To select retiree basic life	R	Insurance option field defaults the retiree plan. There is <b>NO</b> retiree cost.
<b>Beneficiaries Folder</b>	To select the beneficiaries' options	R	Click on the Beneficiaries folder to open. Enter the % of the benefit to be assigned to each beneficiary. (NOTE: If there are no beneficiaries in the system, this folder tab will not be on the screen).

Click the Accept icon  at the bottom of the pop-up window and the window will close. You will be returned to the **“Enrollment Plan Selection”** screen.



This finishes the available selections. Notice that each time you finished a **“Benefit Enrollment”** and returned to the **“Enrollment: Plan Selection”** screen, a green check mark appeared to the left of each completed action. Now that the enrollment actions have been completed, click on the Enroll icon found on the applications toolbar.


- You will see a pop-up screen named **“Confirmation of Selected Actions”**. This screen will show the listing of the benefits and the effective dates for this retiree.

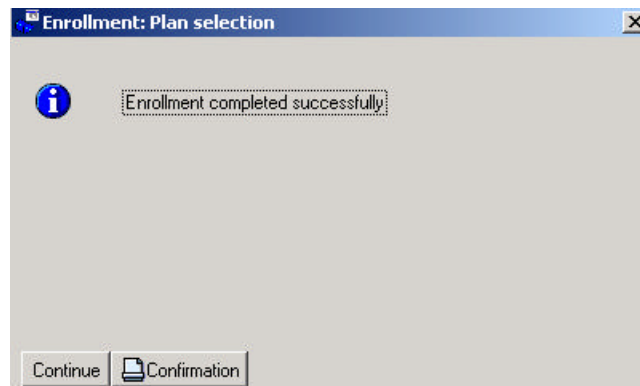


00000460 Snoopy Cat

Action	Plan	From	to	Add. info
Create	Aetna Dental	02/14/2001	12/31/9999	
Create	Aetna Medical	02/14/2001	12/31/9999	
Create	Retiree Basic Life	02/14/2001	12/31/9999	

Enroll Cancel


- If the entries are correct, click on the Enroll icon  at the bottom of the pop-up window. You will see another pop-up window verifying that the enrollment has been completed successfully.



Enrollment completed successfully

Continue Confirmation

- If you are connected to a printer and want or need a printed confirmation, click the **“Confirmation”** icon at the bottom of the window or if you are finished, click the **“Continue”** icon.

You will return to the “Enrollment: Offers” screen. Click the Exit icon  on the “Standard Toolbar” to return to the SAP Easy Access Menu.




**NOTE:** The next step in this process is to maintain the infotype record for “Retiree Basic Life” and input the details of the plan that needs to be captured.

You may access this part of the procedure by using the following menu path.

Menu path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > MAINTAIN**

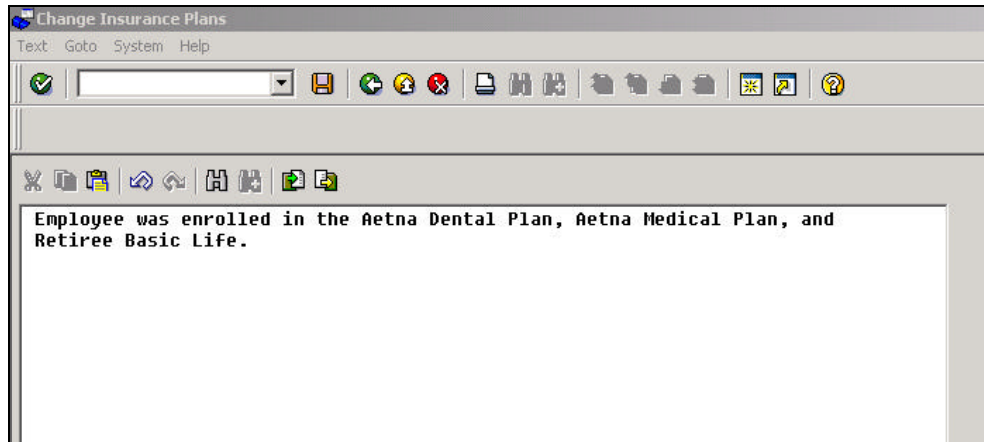
Transaction code: **PA30**


Field Name	Description	R/O/C	User Action/Values/Comments
<b>Personnel Number</b>	Personnel number of the retired employee	R	Enter the personnel number of the retired employee. If you do not know the number, use the dropdown arrow to aid in the selection by doing a Social Security Number search.
<b>Infotype in the Direct selection section</b>	The number of the infotype to be edited.	R	Enter the infotype number 0168 , clic on Insurance Plan, or click on the dropdown and choose from the menu.
<b>Period</b>	Validity period of the infotype	R	Enter the same date as that used for the enrollment data.

Click on the Change icon on the standard tool bar , this will bring up the “**Change Insurance Plans**” screen for the selected retired employee.

Click on “**Edit**” on the standard menu bar.

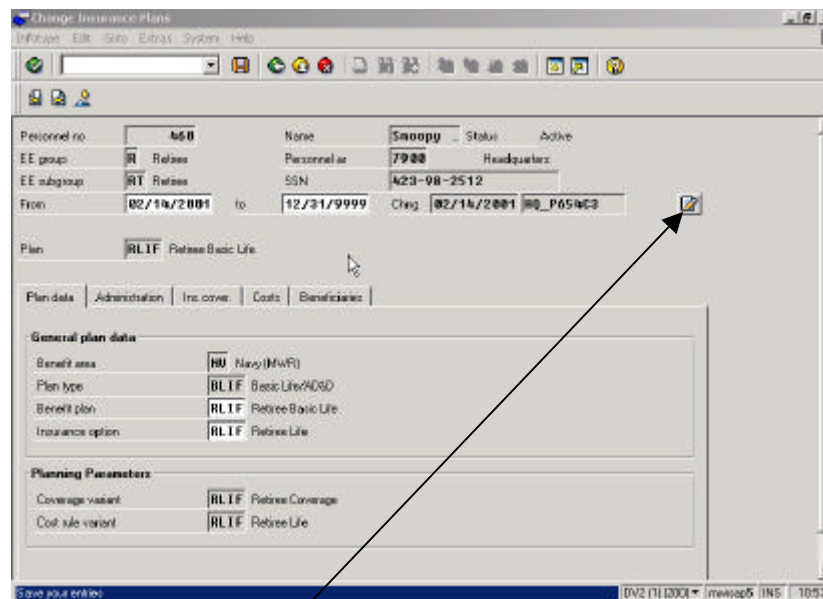
Click on Maintain Text or hit F9. This brings up a screen that allows the entry of all plan details in free text as shown below.





Click on the Save icon , the system will prompt you to Save your changes, click on the Save icon again.

You will be returned to the **“Maintain HR Master Data”** screen.

You will always be able to check on what you have written in the free text box by either clicking on the “Eyeglasses” icon or the “Pencil” icon to inspect the overall infotype – 0168 Insurance Plans record.



Notice the **Pen and Paper** icon  on the right side of the window. By clicking on this icon, you are again shown the free text notes screen.

Click on the Exit icon  on the Standard toolbar to return to the SAP Easy Access menu.



## Employee Benefits Open Enrollment

This procedure will outline, in detail, the steps required to enroll an existing employee in benefits and/or make changes to existing benefit plans, or a newly hired employee needs to enroll in the benefit plans , all during the “Open Enrollment” period.

This document describes the steps required to make changes to employee benefits and/or enroll new employees in benefits during the open enrollment period.

If the employee is new, then enter all dependents and beneficiaries into infotype 0021 – Family/Related Person in master data before enrolling into the benefit plans.



**NOTE:** You do NOT have to perform this step if the employee is not new and/or there is no new dependent/beneficiary information.

If an employee is changing plans, you will need to term their existing plan(s) before doing open enrollment for new plans. End Date will be 12-31-??.

An infotype 0378 – Adjustment Reasons does not have to be completed for Open Enrollment.

Use the following menu path or transaction code to start the process:

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > MASTER DATA > MAINTAIN**

Transaction code: **PA30**



**Maintain HR Master Data**

HR master data Edit Goto Extras Utilities Settings System Help

Personnel no. **765**

Name **THOMAS TESTERONI**

EE group **5** NF Pers.area **1287** Northwest Region MWR

EE subgroup **FT** Reg Full Time Cost center **488** CHILD DEV EVE P...

Basic personal data Contract data Gross/net payroll Net payroll Add'l payroll data Planning data Time data

Actions ☒ Organizational Assignment ☒ Personal Data ☒ Addresses ☒ Bank Details ☒ **Family/Related Person** ☒ Challenge ☐ Internal Medical Service ☐ Maternity Protection/Parental Leave ☐ Military Service ☐

**Period**

☒ Period Fr.  To

☐ Today ☐ Curr.week

☐ All ☐ Current month

☐ From curr.date ☐ Last week

☐ To current date ☐ Last month

☐ Curr.period ☐ Current year

**Direct selection**

Infotype  STy

DV2 (1) (200) mwrsap5 INS 12:54

While the method is the same as we have done previously in this manual, we will again go through the process of adding an infotype record. In this case, we are adding a dependent/beneficiary to infotype 0021 – Family/Related Person

Directly enter infotype 0021 into the field as we have done in the past and click the

Create icon .

With this infotype, you will see an interim pop-up window asking for additional information as shown below.

**Subtypes for infotype 0021 (Family/Related Person)**

STyp	Name
<b>1</b>	Spouse
<b>2</b>	Child
<b>3</b>	Other
<b>4</b>	Step-Child

Choose the Family/Related person that we are creating the infotype for. In the example that we are using, we highlight 1 – Spouse and click the green check mark.

**Create Family/Related Person**

Infotype Edit Goto Extras System Help

From: [ ] To: 12/31/9999

Family type: Spouse

**Personal data**

Last name: Cat  
 First name: Lucy  
 Gender: ☒ Female ☐ Male  
 Birth date: 02/24/1970  
 SSN: 123-45-5566  
 Tel.no.: 901 333-3333  
 Street: 701 Charlie Brown Cove  
 Sep. date: [ ]  
 City/state: Millington TN  
 Zip/country: 38055 US

**Physician**

Physician1: Lewis  
 ID number: 877965  
 Physician2: [ ]  
 ID number: [ ]

**Status**

☐ Student  
☐ COBRA  
☐ Medicare  
☐ Smoker



**Challenge**

☐ Disability  
 Disab.date: [ ]  
 Learned: [ ]

DV2 (1) (200) mwrsap5 INS 12:40

Enter the information required in the screen Create Family Related Person as shown above. Use the table below to determine the correct entries.

Field Name	Description	R/O/C	User Actions/Values
<b>From Date</b>	Effective date of the benefit enrollment	R	Enter the effective date and leave the “To Date” as 12/31/9999”
<b>Family type</b>	Relationship	R	This field will be defaulted based on the subtype chosen in the pop-up window menu
<b>Last Name</b>	Last name of the beneficiary or dependent	R	Enter the last name.
<b>First Name</b>	First name of the beneficiary or dependent	R	Enter the first name
<b>Gender</b>	Female or male	R	Click the radio button next to the correct selection
<b>Birth Date</b>	Birth date of dependent. Birth date of beneficiary not required	R	Enter the birth date as required.
<b>SSN</b>	Social Security Number	R	Enter the Social Security Number of the dependent or beneficiary
<b>Street/City/State Zip/Country</b>	Permanent Address	R	Address of the dependent or beneficiary
<b>Physician</b>	Physician of the dependent	R	Enter the Primary Care Physician of the dependent
<b>ID Number</b>	Physician ID number	R	Enter the dependent’s Primary Care Physician ID Number.
<b>Status</b>	Student	C	Required if dependent is over 19 years of age
<b>Challenge</b>	Whether the dependent is disabled/ handicapped.	C	Check if the dependent is disabled/ handicapped.

Once the screen is completed, Click the enter check mark  to validate the entries and the click the Save icon  to save the transaction.




**NOTE:** A time saving tip would be to create all the dependents and/or beneficiaries for the employees you are planning to enroll into benefits before starting the benefit enrollment process.

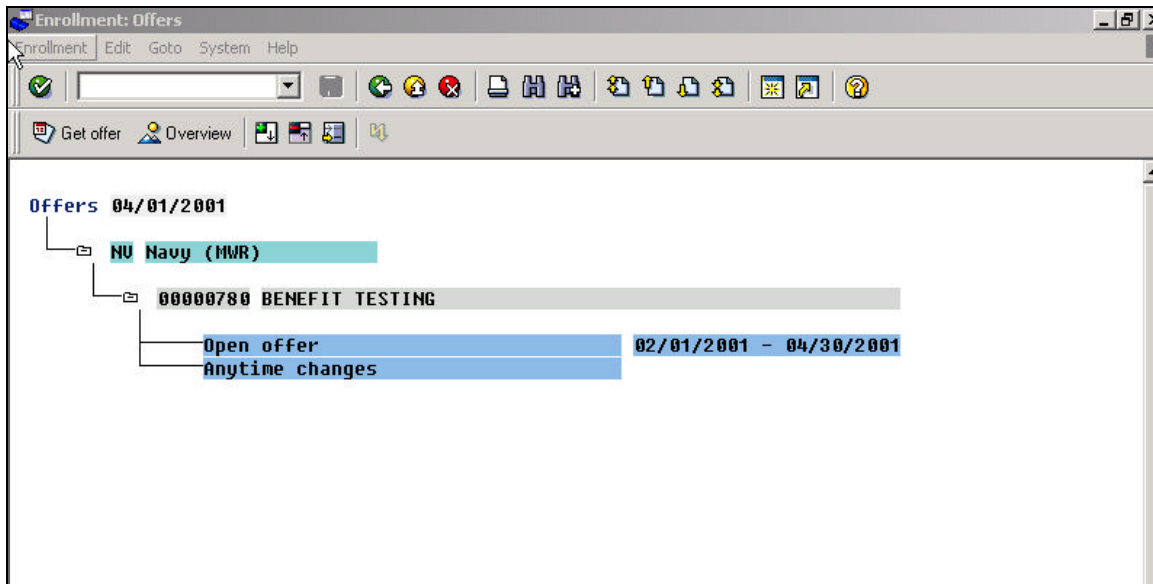
Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > BENEFITS > ENROLLMENT**

Transaction Code: **HRBEN0001**

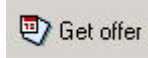
Enter the information for this screen based on the table below.

Field Name	Description	R/O/C	User Action/Values
Key Date	Effective date of benefits	R	Enrolling of an open enrollment is the first of year for enrollment period.
Selection	Personnel Number	R	Enter the employee's personnel number and click the Execute icon  on the application toolbar

You are now at a screen labeled “Enrollment Offers” as shown on the next page.

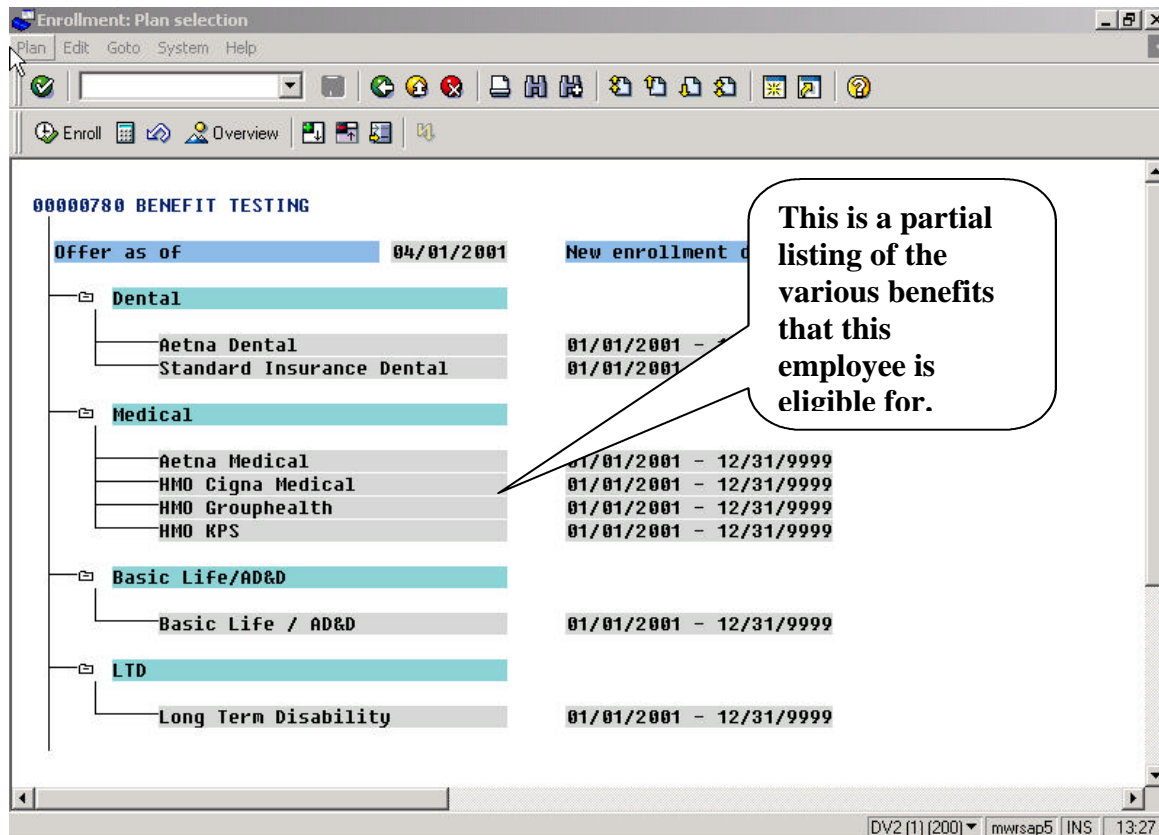


Highlight the line reading **“Open Offer”** and click on the pushbutton labeled Get Offer



**OR** highlight the line reading **“New Hire Enrollment”** or **“Open Offer”** and double click.

The next screen will list all the plans that the employee is eligible for. This is the point where we can start the enrollment process.



The procedure for enrolling employees into any of the eligible plans is essentially the same. The first step is to **highlight** the intended plan and **double click** on the line.

**Maintain Health Plan**

Pers.no. **780** BENEFIT TESTING

Plan **Aetna Dental**

From **01/01/2001** - **12/31/9999**

☐ Stop participation in period

**Option**

**Plan options**

Option **Aetna Dental**

Dependent cov. **Employee Only**

**Costs USD Bi-weekly**

Employee **3.00** ☒ Deducts pre-tax

Employer **0.00**

Accept

The first screen, which is typical of all of the benefit enrollment windows, is the Maintain Health Plan.

Field Name	Description	R/O/C	User Action/Values
<b>Option folder tab</b>	To select plan option and dependent coverage	R	Option field will default with the dental plan. Click on the dropdown arrow on the field labeled <b>Dependent cov.</b> and click on the coverage the employee has selected. The employee cost will automatically appear
<b>Dependent folder tab</b>	Dependents to be covered	R	Click on the Dependent folder tab to open. Click on the button to the left of each dependent's name. If there are no dependents, this tab will not appear.

Click the accept icon at the bottom of the pop-up enrollment window, the window closes and you will then return to the **Enrollment Plan Selection** screen.

**Highlight and double click** on the next indented plan in which you are enrolling the employee. We are showing the selection of Basic Life Insurance.

**Maintain Insurance Plan**

Pers.no. **780** BENEFIT TESTING

Plan **Basic Life / AD&D**

From **01/01/2001** - **12/31/9999**

☐ Stop participation in period

**Coverage**

**Insurance option and coverage**

Insur. option **Basic Life / AD&D**

Basic cover. **20,000.00** USD

Addtl. units **2,000** X **1.00** USD

Coverage **22,000.00** USD

**Costs USD Bi-weekly**

Employee **4.40** ☐ Deduct pre-tax

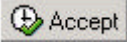
Employer **0.00**

Accept

We enter and check the information as specified in the table below:

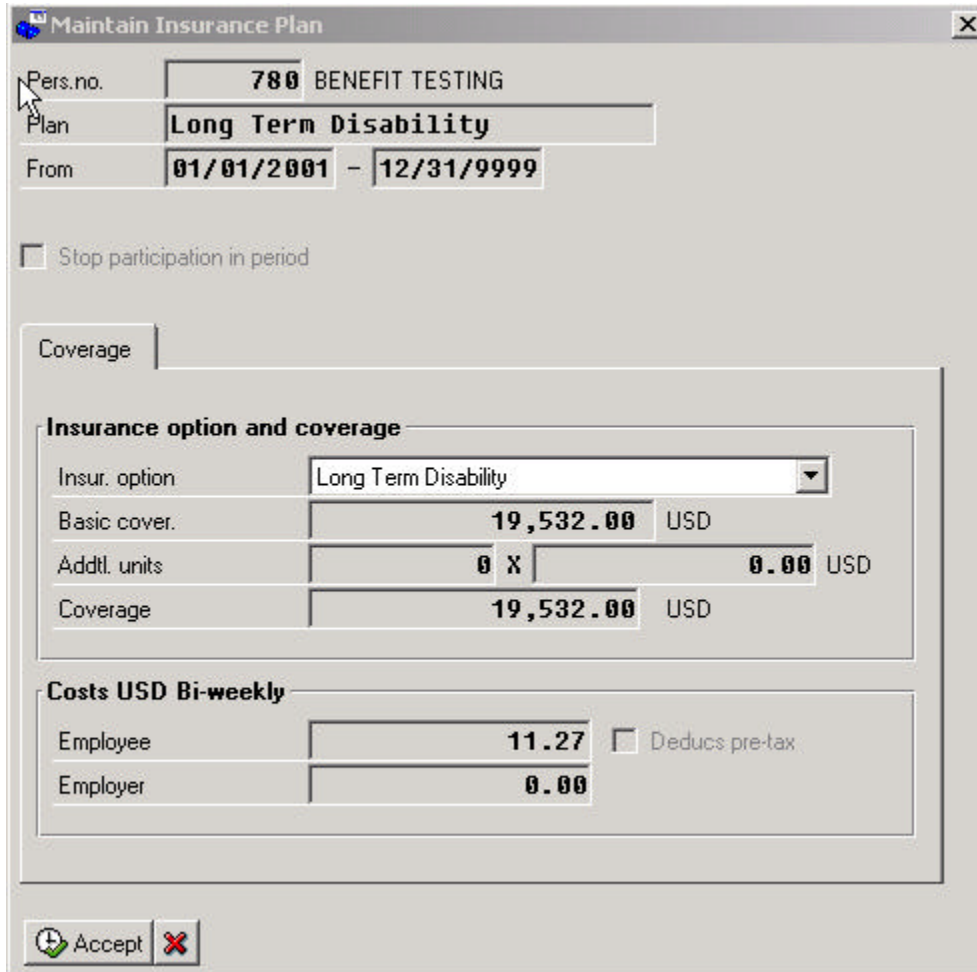
Field Name	Description	R/O/C	User Action/Values
<b>Coverage folder tab</b>	To select Basic Life/AD&D coverage	R	Insurance option defaults this plan. Input 2000 into the “Addtl units” field. <b>This field is configured to accept nothing else.</b> You will note that the Employee cost will automatically appear.
<b>Beneficiaries folder tab</b>	Input field	R	Click on the “Beneficiary Folder” and enter the percentage % of the benefit to be assigned each dependent.



Click the accept icon  on the bottom of the pop-up window, the window will close and you will be returned to the “Enrollment Plan Selection” screen.

Continue to highlight and double click on each of the indented plans in which you are enrolling an employee and proceed with each benefit enrollment following the same procedures as described above.

For example, for **Long Term Disability Insurance**:



**Maintain Insurance Plan**

Pers.no. **780** BENEFIT TESTING

Plan **Long Term Disability**

From **01/01/2001** - **12/31/9999**

☐ Stop participation in period

**Coverage**

**Insurance option and coverage**

Insur. option **Long Term Disability**

Basic cover. **19,532.00** USD

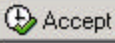

Addtl. units **0** X **0.00** USD

Coverage **19,532.00** USD

**Costs USD Bi-weekly**

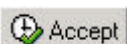
Employee **11.27** ☐ Deducts pre-tax

Employer **0.00**

 Accept 

Click on the dropdown arrow on the **Ins. Option** line. Select either Long Term Disability or LTD Paid up.

Note: If choosing the Long-Term Disability option, the employee cost will appear.

Click the accept icon  on the bottom of the pop-up window, the window will close and you will be returned to the “Enrollment Plan Selection” screen.

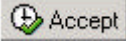
The next example of the procedures is illustrated using the **Optional Life Insurance** enrollment.

The screenshot shows a window titled "Maintain Insurance Plan". It contains the following fields and sections:

- Pers.no.**: 780 BENEFIT TESTING
- Plan**: Optional Life
- From**: 01/01/2001 - 12/31/9999
- ☐ Stop participation in period
- Coverage** section:
  - Insurance option and coverage**:
    - Insur. option**: Optional Life 2X Sal (dropdown)
    - Basic cover.**: 40,000.00 USD
    - Addtl. units**: 0 X 0.00 USD
    - Coverage**: 40,000.00 USD
  - Costs USD Bi-weekly**:
    - Employee**: 6.00 ☐ Deducts pre-tax
    - Employer**: 0.00
- Buttons: Accept (with a green checkmark icon) and Cancel (with a red X icon).

Double click on the **Optional Life** line.

Click the dropdown arrow next to **Insur. Option**. Choose either Optional Life 1X Salary or Optional Life 2X salary.

Click the accept icon  on the bottom of the pop-up window, the window will close and you will be returned to the "Enrollment Plan Selection" screen.

The next example of the procedures is illustrated using the **401K Savings Plan** enrollment.

**Maintain Savings Plan**

Pns.no. **788** BENEFIT TESTING

Plan **401K Plan**

From **01/01/2001** - **12/31/9999**

☐ Stop participation in period

Contribution regular | Investments

**Pre-tax contribution Bi-weekly**

Amount **0.00** USD ☐ Rollover

Percentage **15.00**

Units **0** x **0.00** USD

**Post-tax contribution Bi-weekly**

Amount **0.00** USD ☐ Post-tax immed.

Percentage **0.00**

Units **0** x **0.00** USD

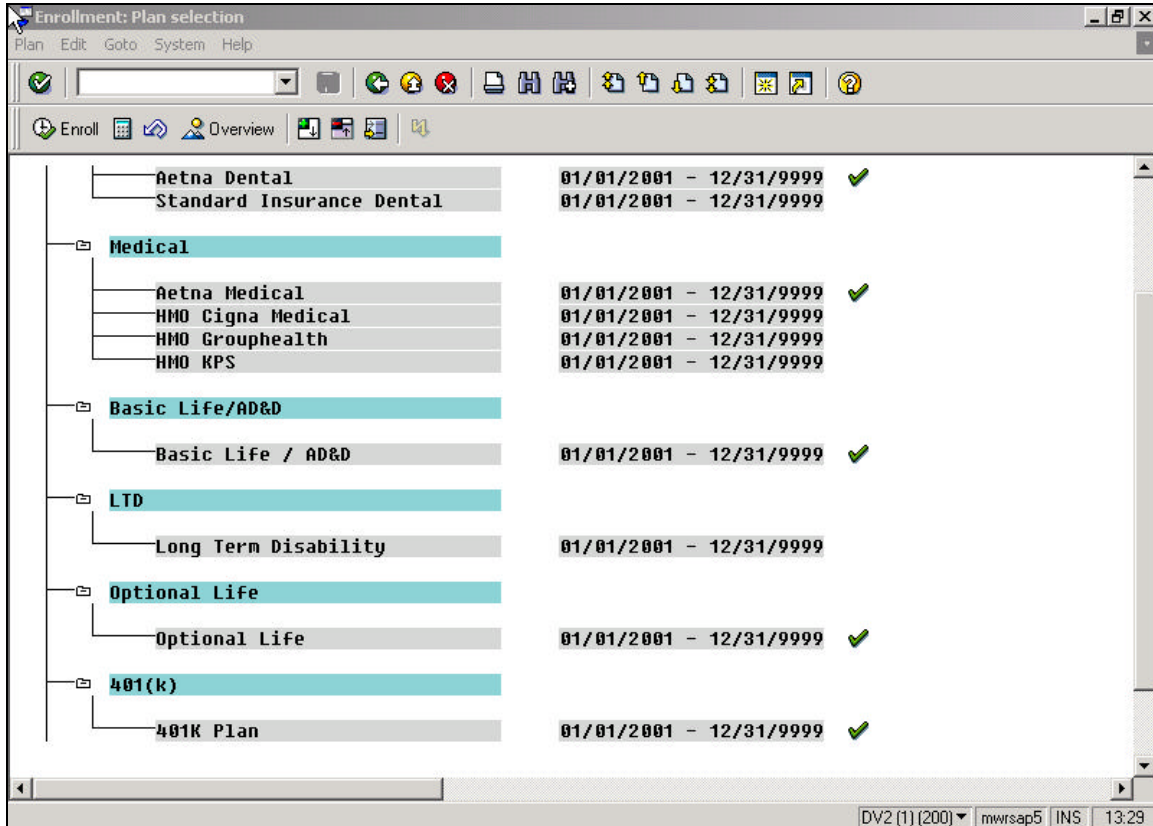
Accept

The inputs for this **Maintain Savings Plan** screen are as follows. The table below explains the inputs for all three of the folder tabs.

Tab Names	Description	R/O/C	User Action/Values/Comments
<b>Contributions Regular</b>	Pre-tax, bi-weekly contribution	R	Percentage. Enter a percentage amount between 1 – 15%. The system will generate an error if the percentage is over 15%.
<b>Investments</b>	Input field	R	Click on the <b>Investments</b> tab. Enter the percentage of investments applicable to each plan. Percentages must total 100%
<b>Beneficiaries</b>	Input field	R	Click on the <b>Beneficiaries</b> tab. Enter the % of the benefit to be distributed to each beneficiary. If the beneficiary is someone other than a spouse, the date must also be entered in the Spousal Consent field.

Click the Accept icon on the bottom of the pop-up window, the window will close and you will be returned to the “Enrollment Plan Selection” screen.

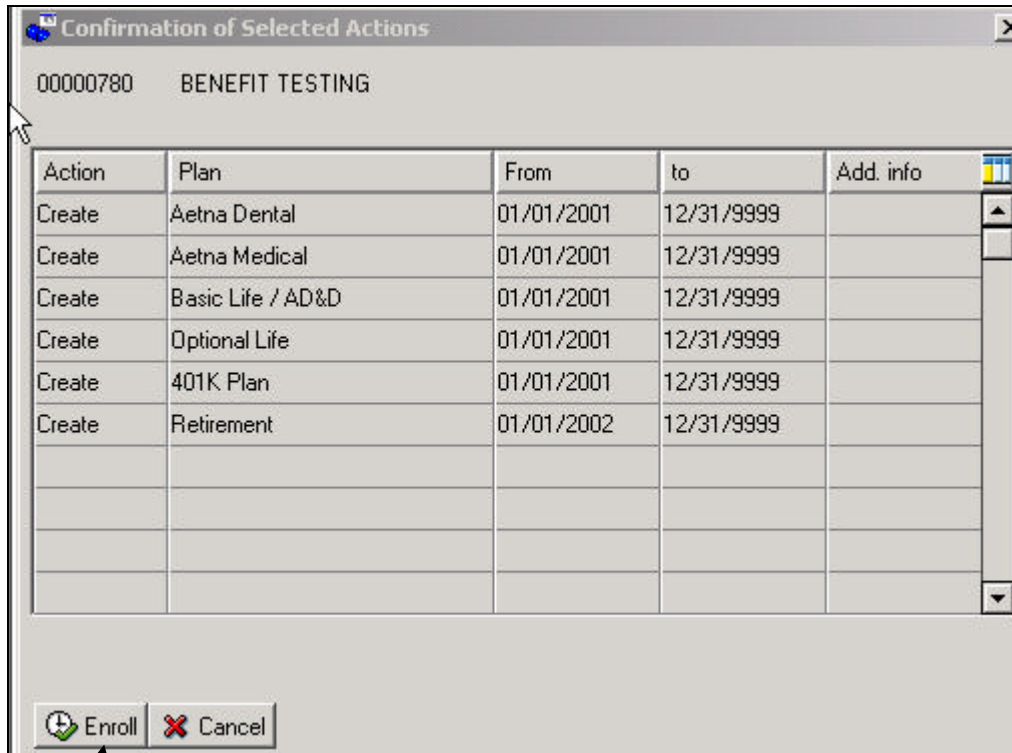
Notice that each time you finished a “**Benefit Enrollment**” and returned to the “**Enrollment Plan Selection**” screen, a “check mark” appears to the right of each completed action.



When all the enrollment actions have been complete, click on the Enroll icon on the applications toolbar.

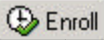
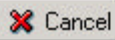


You will now see a pop-up screen labeled **Confirmation of Selected Actions**. This window will show you a list of all the enrolled benefits and their effective dates.



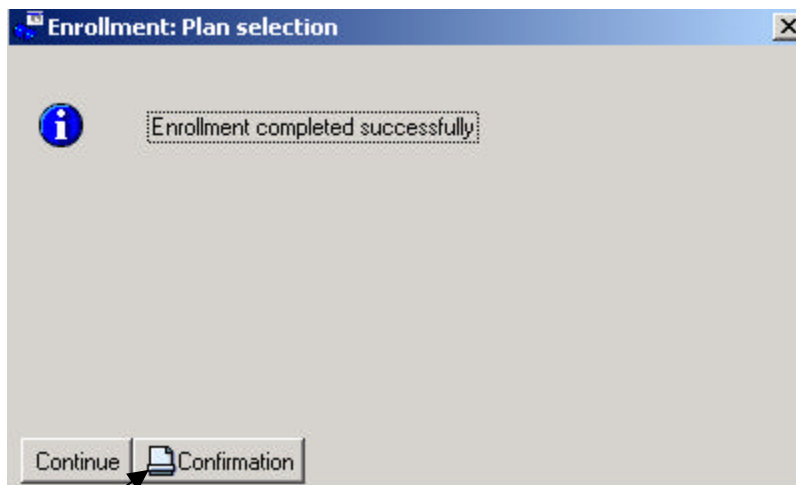
00000780 BENEFIT TESTING


Action	Plan	From	to	Add. info
Create	Aetna Dental	01/01/2001	12/31/9999	
Create	Aetna Medical	01/01/2001	12/31/9999	
Create	Basic Life / AD&D	01/01/2001	12/31/9999	
Create	Optional Life	01/01/2001	12/31/9999	
Create	401K Plan	01/01/2001	12/31/9999	
Create	Retirement	01/01/2002	12/31/9999	



 Enroll  Cancel

If all the information is correct, click on the Enroll pushbutton on the bottom of the pop-up window.

You will see another popup window verifying that the enrollment has been completed successfully.

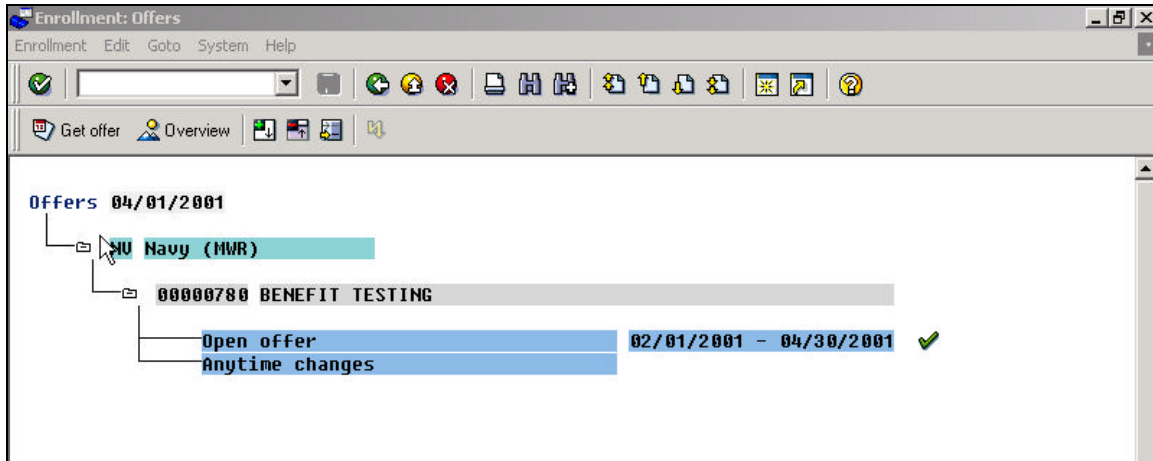



 Enrollment completed successfully

  Confirmation

At this point, if you are connected to a printer and the employee wants a printed confirmation of all the enrollments, click the Confirmation icon at the bottom of the window or if you are finished, click on the "Continue" button.

You are returned to the **Enrollment: Offers** screen. You may continue to enroll another employee or if you are finished with the benefit enrollment transaction.



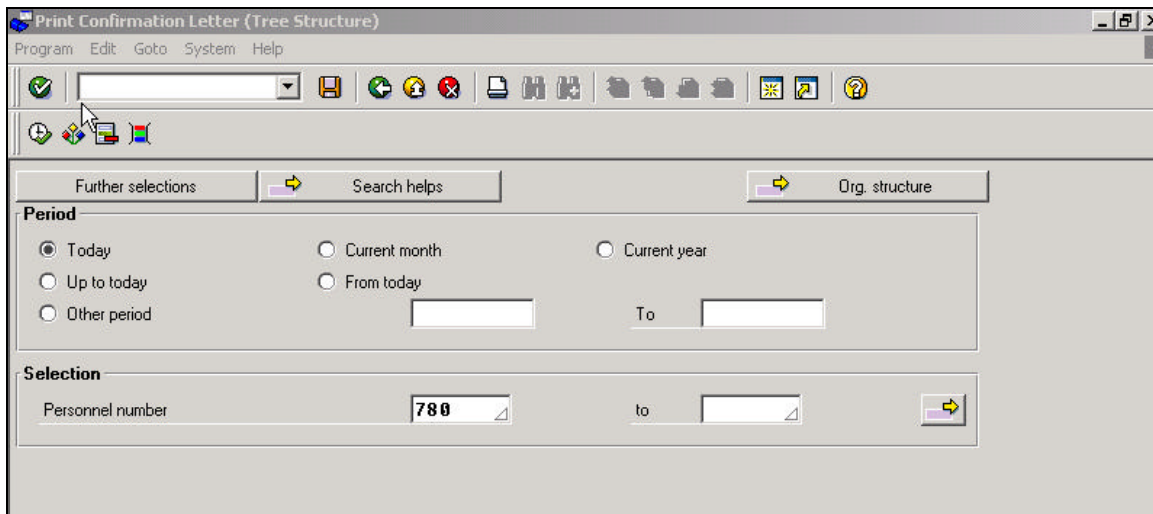
Click the Exit icon  on the Standard toolbar to return to the SAP Easy Access Screen.

### To Print the Forms:

**HUMAN RESOURCES>PERSONNEL MANAGEMENT>BENEFITS>FORMS**

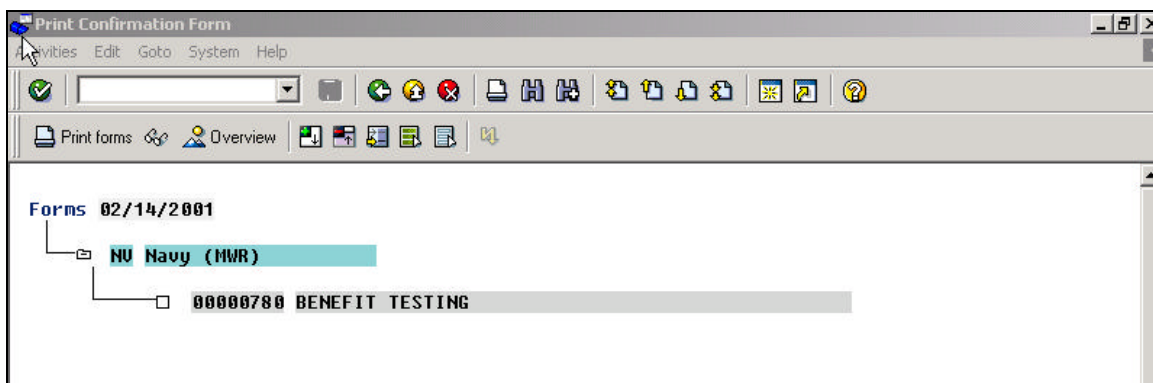
Choose either:


- Enrollment
- Confirmation



Enter the date and personnel number.

Click the Execute  icon.



Click the Print Forms  icon.



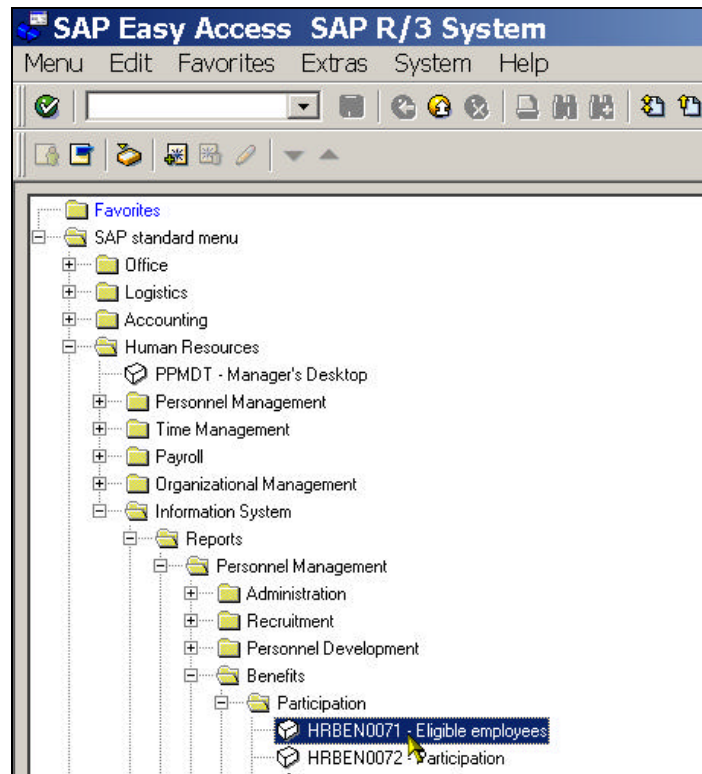
**NOTE:** The SAP Easy Access Screen shows the report name. The screen can be customized to show transaction codes as well using the “Extras > settings > show technical name” menu path in the standard toolbar.



### Benefits Eligibility Report

**HUMAN RESOURCES > INFO SYSTEM > REPORTS > PERSONNEL MGMT > BENEFITS > PARTICIPATION > Eligible Employees**

Transaction code **HERBEN0071**




If using the menu path, double click “**HRBEN0071 – Eligible employees**” to go to the next screen.



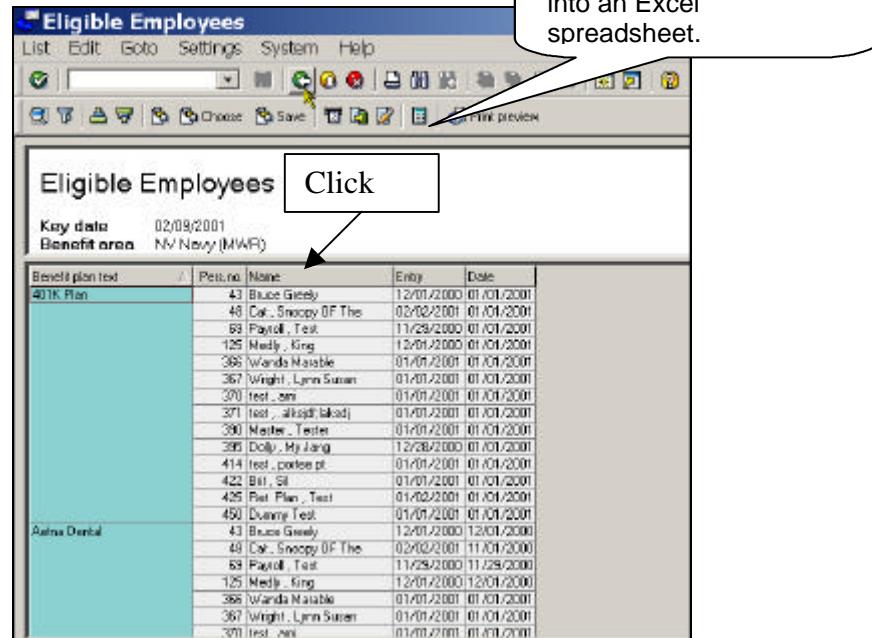
*Screen: Eligible Employees*

The screenshot shows the 'Eligible Employees' application window. It features a menu bar (Program, Edit, Goto, System, Help) and a toolbar with various icons. The main interface includes three sections: 'Key date' with radio buttons for 'Today' (selected) and 'Other keydate' (with an adjacent text field); 'Selection' with 'Personnel number' input fields and a range selector; and 'Additional selection' with dropdown menus for 'Benefit area' (showing 'NV'), '1st Program grouping' (showing 'HQ'), and 'Benefit plan'. To the right of these dropdowns are range selectors ('to' fields) and a 'Multiple selection' button (represented by three stacked arrows). Two callout boxes provide additional information: one points to the 'Further selections' button, stating 'The Further Selections buttons allows you to limit your report to specific Personnel areas.'; the other points to the 'Multiple selection' button, stating 'Multiple selection option. Allows you to choose a range of groupings to be shown in the report'.

Field Name	Description	R/O/C	User Action, Values, Comments
<b>Key Date</b>	Date for which report is to be generated	R	If report is for the present day, leave “Today” checked, or if the report is for a different day, then select “Other keydate” and put in the desired date.
<b>Personnel Number</b>	Personnel number range	O	Enter the desired personnel number, range or leave blank for all personnel
<b>Benefit Area</b>	Benefit Area	R	Enter NV or select NV using the dropdown arrow
<b>1<sup>st</sup> Program Grouping</b>	Region	O	Enter the desired 1 <sup>st</sup> program grouping or select using dropdown arrow. <b>When selecting more than one program grouping or benefit plan, use multiple selection option</b>
<b>2<sup>nd</sup> Program Grouping</b>	Classification	O	Enter the desired 2 <sup>nd</sup> program grouping or select using the dropdown arrow. <b>When selecting more than one program grouping or benefit plan, use multiple selection option</b>
<b>Benefit Plan</b>	Benefit plans available	O	Enter the identifier if known or select using the dropdown arrow. <b>When selecting more than one program grouping or benefit plan, use multiple selection option</b>

Select  icon to generate report.

## Eligible Employees




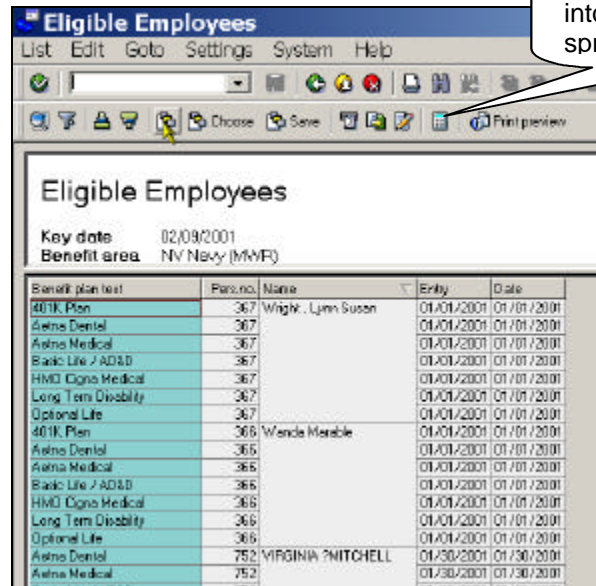
Click this icon to put data into an Excel spreadsheet.

Click

Benefit plan text	Pers.no	Name	Entry	Date
401K Plan	43	Bruce Greely	12/01/2000	01/01/2001
	48	Carl, Snoddy OF The	02/02/2001	01/01/2001
	69	Payroll, Test	11/29/2000	01/01/2001
	125	Medly, King	12/01/2000	01/01/2001
	366	Wanda Naisable	01/01/2001	01/01/2001
	367	Wright, Lynn Susan	01/01/2001	01/01/2001
	370	test, am	01/01/2001	01/01/2001
	371	test, alijsd (akad)	01/01/2001	01/01/2001
	390	Master, Tester	01/01/2001	01/01/2001
	399	Dolly, My Jang	12/28/2000	01/01/2001
Aetna Dental	414	test, pokes pl	01/01/2001	01/01/2001
	422	Bil, Sil	01/01/2001	01/01/2001
	426	Pet Plan, Test	01/02/2001	01/01/2001
	450	Dwayne Test	01/01/2001	01/01/2001
	43	Bruce Greely	12/01/2000	12/01/2000
	48	Carl, Snoddy OF The	02/02/2001	11/01/2000
	69	Payroll, Test	11/29/2000	11/29/2000
	125	Medly, King	12/01/2000	12/01/2000
	366	Wanda Naisable	01/01/2001	01/01/2001
	367	Wright, Lynn Susan	01/01/2001	01/01/2001

Report first appears sorted by benefit plan. To sort by employee, highlight the column with employee names by clicking once at the top (see illustration). Then select the *Sort*


*Descending*  icon. You can now see all the plans each employee is eligible for next to the employee name.

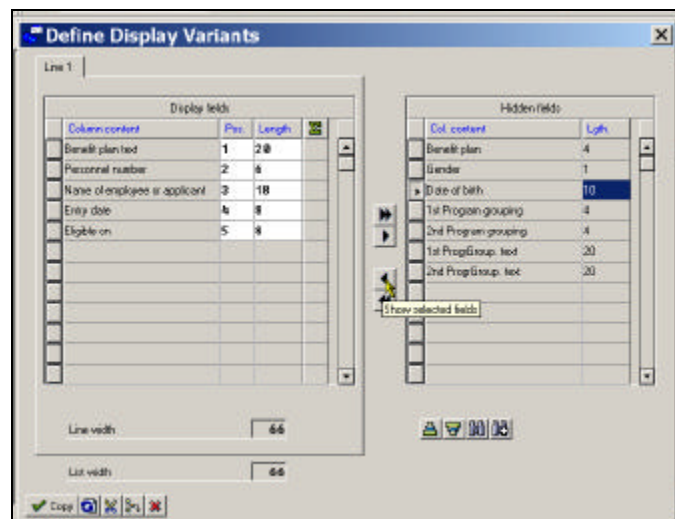
Eligible Employees


**Eligible Employees**

Key date: 02/09/2001  
Benefit area: NV/Navy (MMF)

Benefit plan text	Pers.no.	Name	Entry	Date
401K Plan	367	Wright, Lynn Susan	01/01/2001	01/01/2001
Aetna Dental	367		01/01/2001	01/01/2001
Aetna Medical	367		01/01/2001	01/01/2001
Basic Life / AD&D	367		01/01/2001	01/01/2001
HMO Cigna Medical	367		01/01/2001	01/01/2001
Long Term Disability	367		01/01/2001	01/01/2001
Optional Life	367		01/01/2001	01/01/2001
401K Plan	366	Wanda Marable	01/01/2001	01/01/2001
Aetna Dental	366		01/01/2001	01/01/2001
Aetna Medical	366		01/01/2001	01/01/2001
Basic Life / AD&D	366		01/01/2001	01/01/2001
HMO Cigna Medical	366		01/01/2001	01/01/2001
Long Term Disability	366		01/01/2001	01/01/2001
Optional Life	366		01/01/2001	01/01/2001
Aetna Dental	752	VIRGINIA MITCHELL	01/30/2001	01/30/2001
Aetna Medical	752		01/30/2001	01/30/2001

Change the variants (column descriptions) by selecting the  icon. You will see the following screen:

Define Display Variants


**Define Display Variants**

Line 1


Column content	Pos.	Length
Benefit plan text	1	20
Personnel number	2	8
Name of employee or applicant	3	18
Entry date	4	8
Eligible on	5	8

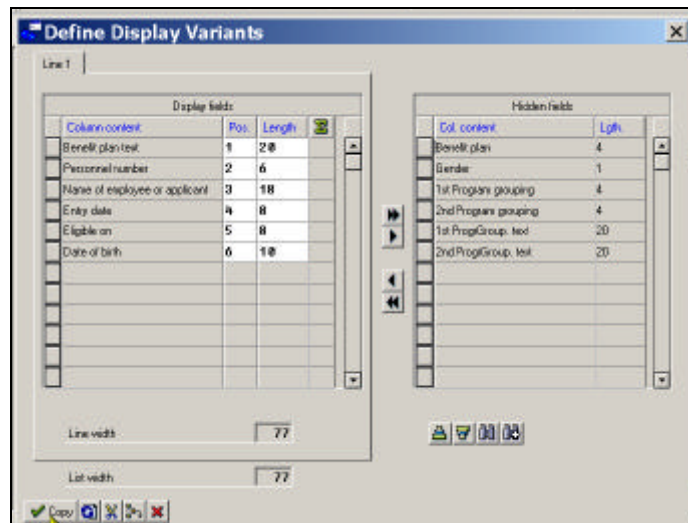
Col. content	Length
Benefit plan	4
Gender	1
Date of birth	10
1st Program grouping	4
2nd Program grouping	4
1st Program group text	20
2nd Program group text	20

Line width: 66  
List width: 66

Copy Paste Print

The column on the left lists the description and position of the variants that are already displayed in the report. The column on the right lists variants that are hidden. “Unhide” them by selecting one or more variants, then click the arrow pointing left (as shown). For example, to display date of birth, select it by clicking on it. Clicking the left pointing arrow moves the selected variant from the column on the right to the column on the left.

Select the  icon to save the changes and view the report with the now “unhidden” variant or variants





The sample report shows that the “birth date” for each employee is now visible.

### Eligible Employees

Click this icon to put data into an Excel spreadsheet.

Benefit plan test	Person	Name	Entry	Date	Birth date
401K Plan	367	Wright, Lynn Susan	01/01/2001	01/01/2001	07/29/1954
Aetna Dental	367		01/01/2001	01/01/2001	07/29/1954
Aetna Medical	367		01/01/2001	01/01/2001	07/29/1954
Basic Life / AD&D	367		01/01/2001	01/01/2001	07/29/1954
HMO Cigna Medical	367		01/01/2001	01/01/2001	07/29/1954
Long Term Disability	367		01/01/2001	01/01/2001	07/29/1954
Optional Life	367		01/01/2001	01/01/2001	07/29/1954
401K Plan	366	Wanda Marable	01/01/2001	01/01/2001	08/02/1954
Aetna Dental	366		01/01/2001	01/01/2001	08/02/1954
Aetna Medical	366		01/01/2001	01/01/2001	08/02/1954
Basic Life / AD&D	366		01/01/2001	01/01/2001	08/02/1954
HMO Cigna Medical	366		01/01/2001	01/01/2001	08/02/1954
Long Term Disability	366		01/01/2001	01/01/2001	08/02/1954
Optional Life	366		01/01/2001	01/01/2001	08/02/1954
Aetna Dental	752	VIRGINIA MITCHELL	01/30/2001	01/30/2001	07/04/1969
Aetna Medical	752		01/30/2001	01/30/2001	07/04/1969
Basic Life / AD&D	752		01/30/2001	01/30/2001	07/04/1969
HMO Cigna Medical	752		01/30/2001	01/30/2001	07/04/1969
Long Term Disability	752		01/30/2001	01/30/2001	07/04/1969
Optional Life	752		01/30/2001	01/30/2001	07/04/1969
Aetna Dental	752	THOMAS TEST	01/30/2001	01/30/2001	07/04/1969

Select the  icon to exit the report or  to go back

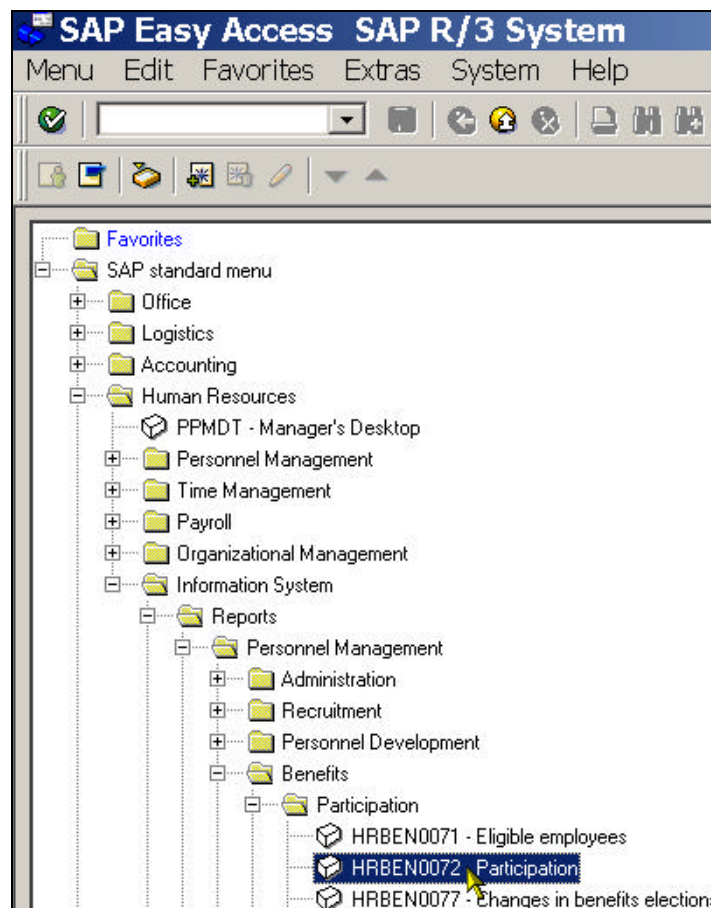


## Employee Benefits Participation

This document describes the procedure required to generate a report showing employees participating in select or all Benefit plans.

**HUMAN RESOURCES > INFORMATION SYSTEM > REPORTS > PERSONNEL MANAGEMENT > BENEFITS > PARTICIPATION > HRBEN0072 – PARTICIPATION**

Transaction code **HRBEN0072**




If using the menu path, double click “**HRBEN0072 – Participation**” to go to the next screen.

*Participation*

Enter information in the fields as specified in the table below. **Note:** In column “R/O/C,” R = Required, O = Optional, C = Conditional.

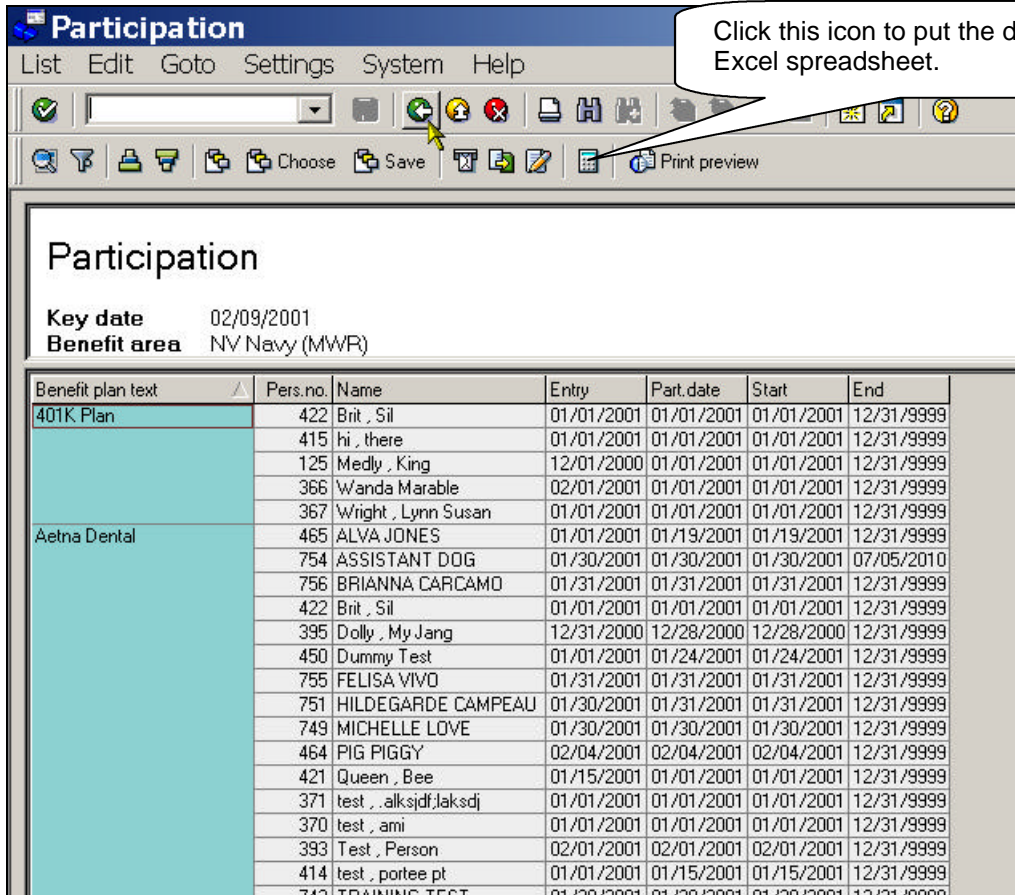
Field Name	Description	R/O/C	User Action, Values, Comments
<b>Period</b>	Period for which report is to be generated	R	Choose the desired period or enter a beginning and end date if you select the other period.
<b>Personnel Number</b>	Personnel number range you want to report on	O	Enter the desired personnel number, range or leave blank for all personnel
<b>Benefit Area</b>	Benefit Area to be reported on	R	Enter NV or select using the dropdown arrow
<b>1<sup>st</sup> Program Grouping</b>	1 <sup>st</sup> Program Grouping to be reported on	O	Enter the desired 1 <sup>st</sup> program grouping or select using the dropdown arrow <b>When selecting more than one program grouping or benefit plan, use multiple selection option</b>
<b>2<sup>nd</sup> Program Grouping</b>	2 <sup>nd</sup> Program Grouping to be reported on	O	Enter the desired 2 <sup>nd</sup> program grouping or select using the dropdown arrow <b>When selecting more than one program grouping or benefit plan, use multiple selection option</b>
<b>Benefit Plan</b>	Character Identifier for the Benefit Plan	O	Enter the identifier if known or using the dropdown arrow <b>When selecting more than one program grouping or benefit plan, use multiple selection option</b>



Select  icon to generate report.

### Participation


Click this icon to put the data into an Excel spreadsheet.



**Participation**

**Key date** 02/09/2001  
**Benefit area** NV Navy (MWR)

Benefit plan text	Pers.no.	Name	Entry	Part.date	Start	End
401K Plan	422	Brit , Sil	01/01/2001	01/01/2001	01/01/2001	12/31/9999
	415	hi , there	01/01/2001	01/01/2001	01/01/2001	12/31/9999
	125	Medly , King	12/01/2000	01/01/2001	01/01/2001	12/31/9999
	366	Wanda Marable	02/01/2001	01/01/2001	01/01/2001	12/31/9999
	367	Wright , Lynn Susan	01/01/2001	01/01/2001	01/01/2001	12/31/9999
Aetna Dental	465	ALVA JONES	01/01/2001	01/19/2001	01/19/2001	12/31/9999
	754	ASSISTANT DOG	01/30/2001	01/30/2001	01/30/2001	07/05/2010
	756	BRIANNA CARCAMO	01/31/2001	01/31/2001	01/31/2001	12/31/9999
	422	Brit , Sil	01/01/2001	01/01/2001	01/01/2001	12/31/9999
	395	Dolly , My Jang	12/31/2000	12/28/2000	12/28/2000	12/31/9999
	450	Dummy Test	01/01/2001	01/24/2001	01/24/2001	12/31/9999
	755	FELISA VIVO	01/31/2001	01/31/2001	01/31/2001	12/31/9999
	751	HILDEGARDE CAMPEAU	01/30/2001	01/31/2001	01/31/2001	12/31/9999
	749	MICHELLE LOVE	01/30/2001	01/30/2001	01/30/2001	12/31/9999
	464	PIG PIGGY	02/04/2001	02/04/2001	02/04/2001	12/31/9999
	421	Queen , Bee	01/15/2001	01/01/2001	01/01/2001	12/31/9999
	371	test , .alksjdf,laksdj	01/01/2001	01/01/2001	01/01/2001	12/31/9999
	370	test , ami	01/01/2001	01/01/2001	01/01/2001	12/31/9999
	393	Test , Person	02/01/2001	02/01/2001	02/01/2001	12/31/9999
	414	test , portee pt	01/01/2001	01/15/2001	01/15/2001	12/31/9999
	743	TRAINING TEST	01/30/2001	01/30/2001	01/30/2001	12/31/9999

The report is generated on the screen and can be printed. If finished, select the  icon to exit the report.

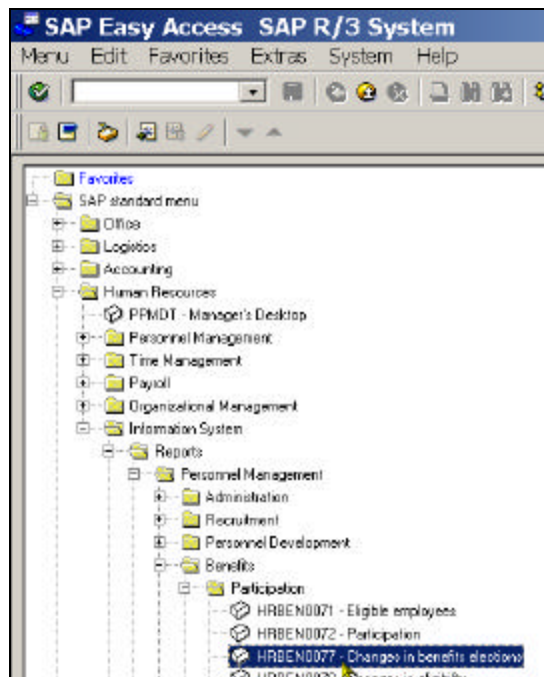


## Changes in Benefits Elections

This document describes the procedure required to generate a report showing which employees have had changes made to their Benefit plans.

### **HUMAN RESOURCES > INFORMATION SYSTEM > REPORTS > PERSONNEL MANAGEMENT > BENEFITS > PARTICIPATION > HRBEN0077 – CHANGES IN BENEFITS ELECTIONS**

Transaction code **HRBEN0077**




If using the menu path, double click “**HRBEN0077 – Changes in Benefits Elections**” to go to the next screen.



*Changes in Benefits Elections*

Enter information in the fields as specified in the table below. **Note:** In column “R/O/C,” R = Required, O = Optional, C = Conditional.

Field Name	Description	R/O/C	User Action, Values, Comments
<b>Period</b>	Period for which report is to be generated	<b>R</b>	Choose the desired period or enter a beginning and end date if you select the other period.
<b>Personnel Number</b>	Personnel number range you want to report on	<b>O</b>	Enter the desired personnel number, range or leave blank for all personnel
<b>Provider</b>	Benefit Provider	<b>O</b>	Enter Provider name or select using dropdown arrow. This dropdown will contain all providers that have records for accounts payable. Scroll down to find provider.
<b>Plan</b>	Benefit plan you want to report on.	<b>O</b>	Enter the desired plan code or select using dropdown arrow.

Select  icon to generate report.

*Changes in Benefits Elections*

**Changes in Benefits Elections**

List Edit Goto System Help

Key date 02/09/2001

Provider: 60000001 Aetna US Healthcare  
Plan : AETD Aetna Dental

Name	Pers.no.	From	To	Changed	By
TESTERONI THOMAS	00000765	02/08/01	02/09/01	02/08/01	HQ_P657F2
Participation terminated					
Total changes		1			


Changes in benefit elections

Key date 02/09/2001

Provider: 60000001 Aetna US Healthcare  
Plan : AETM Aetna Medical

Name	Pers.no.	From	To	Changed	By
Reason Details					

The report is generated on screen and can be printed. Only part of the report is visible in the above illustration. On your screen, scroll down to view. If there have been no changes in benefits for the criteria specified on the initial screen, SAP will inform you that there is “No data available for your entries.”

Select the  icon to exit this report.

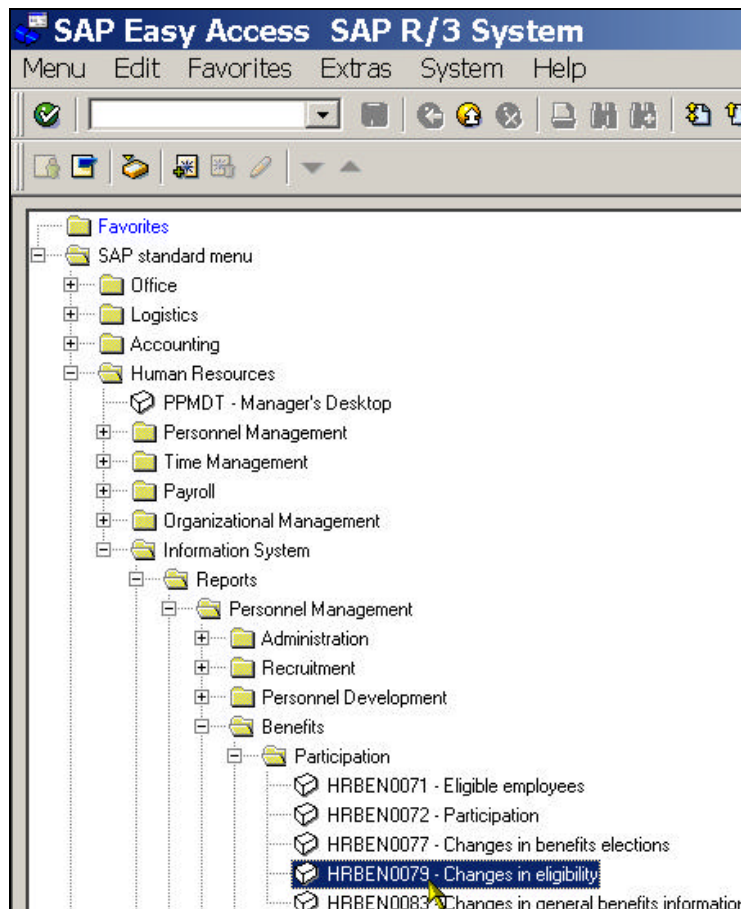


## Employee Changes in Eligibility

This document describes the procedure required to generate a report showing which employees have had changes in their Benefits eligibility.

### **HUMAN RESOURCES > INFORMATION SYSTEM > REPORTS > PERSONNEL MANAGEMENT > BENEFITS > PARTICIPATION > HRBEN0079 – Changes in eligibility**

Transaction code **HRBEN0079**




If using the menu path, double click “**HRBEN0079 – Changes in eligibility**” to go to the next screen.

*Changes in Eligibility*

Enter information in the fields as specified in the table below. **Note:** In column “R/O/C,” **R** = Required, **O** = Optional, **C** = Conditional.

Field Name	Description	R/O/C	User Action, Values, Comments
<b>Period</b>	Period for which report is to be generated	R	Choose the desired period or enter a beginning and end date if you select the other period.
<b>Personnel Number</b>	Personnel number range you want to report on	O	Enter the desired personnel number, range or leave blank for all personnel
<b>Plan</b>	Character Identifier for the Benefit Plan	O	Enter the identifier if known or using the dropdown arrow <b>When selecting more than one program grouping or benefit plan, use multiple selection option</b>

Select  icon to generate report.

Changes in eligibility


**Changes in Eligibility**

List Edit Goto Settings System Help

Changes in Eligibility

Key date 02/09/2001  
Benefit area

Benefit plan text	Pers.no	Name	Changed on	Text
	147	Himmelein , Daniel Jeremiah	02/09/2001	Employee is permitted from the 01/01/2002 (after the evaluation date)
	162	Royer , Rebecca Deidre	02/09/2001	Employee is permitted from the 01/01/2002 (after the evaluation date)
	186	MAYVILLE , RHONDA A	02/09/2001	Employee is permitted from the 01/01/2002 (after the evaluation date)
	276	Espe , Marlene V	02/09/2001	Employee is permitted from the 01/01/2004 (after the evaluation date)
	285	Hourly Kingsbay , NL-3	02/09/2001	Employee not eligible because to old
	285	Hourly Kingsbay , NL-3	02/09/2001	Employee not eligible because to old
	285	Hourly Kingsbay , NL-3	02/09/2001	Employee not eligible because to old
	285	Hourly Kingsbay , NL-3	02/09/2001	Employee not eligible because to old
	285	Hourly Kingsbay , NL-3	02/09/2001	Employee not eligible because to old
	285	Hourly Kingsbay , NL-3	02/09/2001	Employee not eligible because to old
	290	Adams , David Kevin	02/09/2001	Employee is permitted from the 01/01/2002 (after the evaluation date)
	415	hi , there	02/09/2001	No entry existing for program groupings HQ/RETR / plan 401K
	415	hi , there	02/09/2001	No entry existing for program groupings HQ/RETR / plan CSRO
	459	test Ben	02/09/2001	Employee 00000459 is not enrolled in all corequisite plans for AETD

The report is generated on the screen and can be printed. If finished, select the  icon to exit the report.

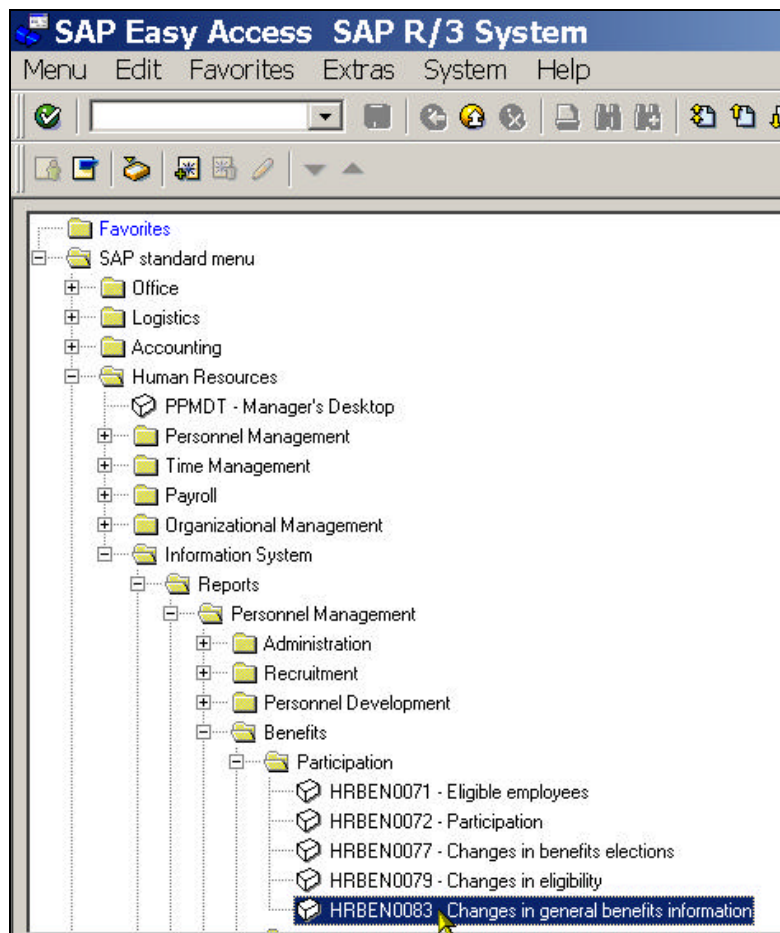


## Employee Changes in General Benefits Information

This document describes the procedure required to generate a report showing which employees have had General Benefits information changed.

**HUMAN RESOURCES > INFORMATION SYSTEM > REPORTS > PERSONNEL MANAGEMENT > BENEFITS > PARTICIPATION > HRBEN0083 – Changes in general benefits information**

Transaction code **HRBEN0083**



If using the menu path, double click “**HRBEN0083 – Changes in personal benefits information**” to go to the next screen.

*Changes in Default Values for General Benefits Information*

**Changes in Default Values for General Benefits Information**

Program Edit Goto System Help

Further selections Search helps Org. structure

**Period**

☒ Today
 ☐ Current month
 ☐ Current year  
☐ Up to today
 ☐ From today
 To   
☐ Other period
  To

**Selection**

Personnel number  to

**Additional selection**

Benefit area  to

1st Program grouping  to


2nd Program grouping  to

**Reason for deviation from default values**






























☒ Manual override  
☐ Change in default values


Field Name	Description	R/O/C	User Action, Values, Comments
<b>Period</b>	Period for which report is to be generated	R	Choose the desired period or a beginning and end date if you select the other period.
<b>Personnel Number</b>	Personnel number range you want to report on	O	Enter the desired personnel number, range or leave blank for all personnel
<b>Benefit Area</b>	Benefit Area to be reported on	R	Enter NV or select using dropdown arrow
<b>1<sup>st</sup> Program Grouping</b>	1 <sup>st</sup> Program Grouping to be reported on	O	Enter the desired 1 <sup>st</sup> program grouping or select using dropdown arrow
<b>2<sup>nd</sup> Program Grouping</b>	2 <sup>nd</sup> Program Grouping to be reported on	O	Enter the desired 2 <sup>nd</sup> program grouping or select using dropdown arrow
<b>Reason for Deviation from Default values</b>	This is the reason for the change/s in Employee default values	R	Select Manual Override or Changes in Default Values.



Select  to generate the report:

*Changes in Default Values for General Benefits Information*

Changes in Default Values for General Benefits Information									
List Edit Goto Settings System Help									
                            									
Choose Save Print preview									
Gen. benefits info: Manual override of default values									
Key date 02/12/2001									
Benefit area NV Navy (MWR)									
△ Pers.no.	Name	1st SG	2.SG	BAr.	1st SG	2.SG	Start	End	
48	Cat , Snoopy OF The	HQ	FULL			NONE	11/01/2000	12/31/9999	
125	Medly , King	HQ	FULL			PRFT	12/01/2000	12/30/2003	
126	May , June	SE	FULL			PRFT	12/01/2000	12/31/2001	
184	COWART , CHRISTIE A	JA	FULL			PRFT	01/01/2001	12/31/9999	
185	KIRKER , BRENDA	JA	PART			PRPT	01/01/2001	12/31/9999	
188	TOWER , SEPTEMBER	JA	FULL			PRFT	01/01/2001	12/31/9999	
189	FONTAINE , MARIA J	JA	PART			PRPT	01/01/2001	12/31/9999	
192	LOFFREDA , TANYA	JA	FULL			PRFT	01/01/2001	12/31/9999	
201	COATS , SUSAN C	JA	PART			PRPT	01/01/2001	12/31/9999	
208	Allen , Wilma Mae	JA	PART			PRPT	01/01/2001	12/31/9999	
210	Almaro , Mary Lee	JA	FULL			PRFT	01/01/2001	12/31/9999	
238	Benson , Melissa Michelle	JA	PART			PRPT	01/01/2001	12/31/9999	
252	Griffith , Tara Rae	JA	FULL			PRFT	01/01/2001	12/31/9999	
260	Reeves , Rosemary	SE	FULL			PRFT	01/01/2001	12/31/9999	
261	Abbott , Larry	SE	PART			PRPT	01/01/2001	12/31/9999	
266	Alan Aplin	SE	FULL	JA			01/01/2001	12/31/9999	
285	Hourly Kingsbay , NL-3	JA	FULL			NBEN	01/01/2001	12/31/9999	
300	Farrales , Rosemarie Rita	SE	FULL			PRFT	01/01/2001	12/31/9999	
301	Lusby , Carol Janine	SE	FULL			PRFT	01/01/2001	03/01/2001	
415	hi , there	HQ	RETR			PRFT	01/11/2001	12/31/9999	

The report is generated on the screen and can be printed. If finished, select the  icon to exit the report.



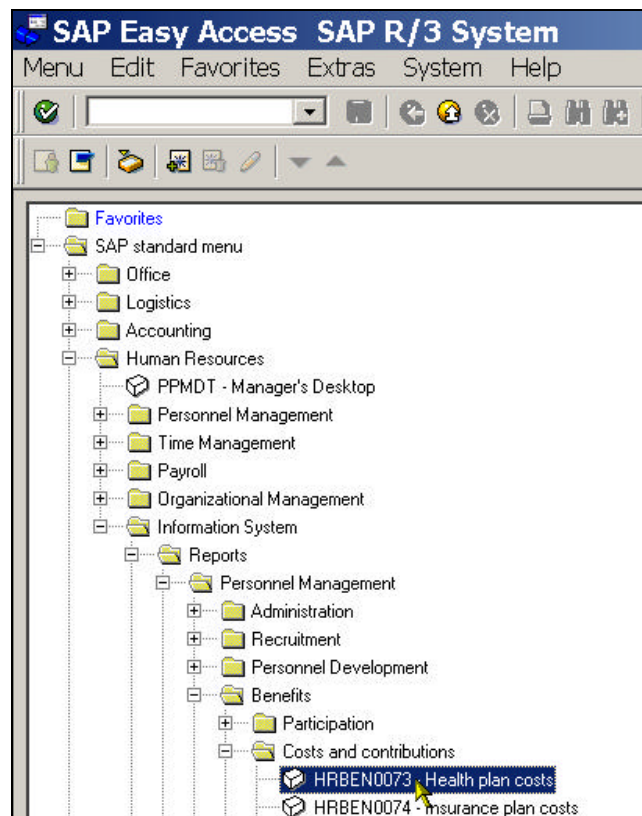


## Employee Health Plan Cost

This document describes the procedure required to generate a report showing the cost of select health plans or all health plans.

**HUMAN RESOURCES > INFORMATION SYSTEM > REPORTS >  
PERSONNEL MANAGEMENT > BENEFITS > COST AND CONTRIBUTIONS >  
HRBEN0073 – Health plan costs**


Transaction code **HRBEN0073**



If using the menu path, double click “**HRBEN0073 – Health plan costs**” to go to the next screen.

Health Plan Costs


Field Name	Description	R/O/C	User Action, Values, Comments
<b>Key date</b>	Date for which report is to be generated	R	Present date is checked, if you need to run report for a different date, select “Other keydate” and put in the desired date.
<b>Personnel Number</b>	Personnel number or range you want to report on	O	Enter the desired personnel number, range or leave blank.
<b>Benefit Area</b>	Benefit Area to be reported on	R	Enter NV or select using dropdown arrow
<b>1<sup>st</sup> Program Grouping</b>	1 <sup>st</sup> Program Grouping to be reported on	O	Enter the desired 1 <sup>st</sup> program grouping or select using dropdown arrow
<b>2<sup>nd</sup> Program Grouping</b>	2 <sup>nd</sup> Program Grouping to be reported on	O	Enter the desired 2 <sup>nd</sup> program grouping or select using dropdown arrow
<b>Benefit Plan</b>	Benefit plans for which report is to be generated	O	Enter the Benefit plan code or select using dropdown arrow, <b>OR</b> leave blank for all health plans

Select  to generate the report:

### Health Plan Costs

Period test	Benefit plan test	Pers. no	Name	Option test	Dep. coverage test	EE
Bi-weekly	Aetna Dental	146	Dela Cruz, Emma Colaste	Aetna Dental	Employee Only	
		162	Flores, Rebecca Deidre	Aetna Dental	Family	
		184	COWART, CHRISTIE A	Aetna Dental	Employee Only	
		186	KIRKERT, BRENDA	Aetna Dental	Employee Only	
		186	MAYVILLE, RHONDA A	Aetna Dental	Family	
		188	TOWER, SEPTEMBER	Aetna Dental	Employee Only	
		189	FONTAINE, MARIA J	Aetna Dental	Employee Only	
		190	KNIGHT, PATSY A	Aetna Dental	Employee Only	
		191	MIMON, JENNIFER	Aetna Dental	Employee Only	
		192	LOFFREDA, TANYA	Aetna Dental	Family	
		199	PETTIGREW, KRYSTAL	Aetna Dental	Employee Only	
		201	COATS, SUSAN C	Aetna Dental	Employee Only	
		202	DOYAL, ERLINDA A	Aetna Dental	Employee Only	
		204	EVANS, ROBERT L	Aetna Dental	Employee Only	
		208	Allen, Wilma Mae	Aetna Dental	Employee Only	
		210	Almaraz, Mary Lee	Aetna Dental	Employee Only	
		212	Lewis, Robert Kyle	Aetna Dental	Employee Only	
		219	Lilly, Sheila Melanie	Aetna Dental	Employee Only	
		223	Benton, Stephen Donald	Aetna Dental	Employee Only	

The report is generated on the screen and can be printed. Use the scroll bars to the right and bottom of the screen to view the entire report not visible here.

If finished, select the  icon to exit the report.

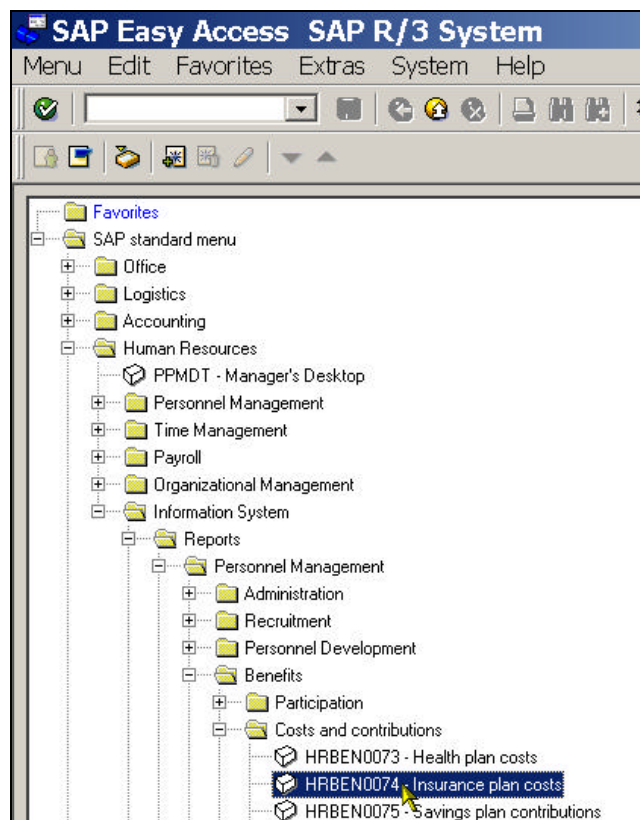


## Employee Insurance Plan Cost

This document describes the procedure required to generate a report showing the cost of select insurance plans or all insurance plans.

**HUMAN RESOURCES > INFORMATION SYSTEM > REPORTS >  
PERSONNEL MANAGEMENT > BENEFITS > COST AND CONTRIBUTIONS >  
HRBEN0074 – Insurance Plan Costs**


Transaction code **HRBEN0074**



If using the menu path, double click “**HRBEN0074 – Insurance plan costs**” to go to the next screen.

*Insurance Plan Costs*

Field Name	Description	R/O/C	User Action, Values, Comments
<b>Key date</b>	Date for which report is to be generated	R	Present date is checked, if you need to run report for a different date, select “Other keydate” and put in the desired date.
<b>Personnel Number</b>	Personnel number or range you want to report on	O	Enter the desired personnel number, range or leave blank for all personnel
<b>Benefit Area</b>	Benefit Area to be reported on	R	Enter NV or select using dropdown arrow
<b>1<sup>st</sup> Program Grouping</b>	1 <sup>st</sup> Program Grouping to be reported on	O	Enter the desired 1 <sup>st</sup> program grouping or select using dropdown arrow
<b>2<sup>nd</sup> Program Grouping</b>	2 <sup>nd</sup> Program Grouping to be reported on	O	Enter the desired 2 <sup>nd</sup> program grouping or select using dropdown arrow
<b>Benefit Plan</b>	Benefit plans for which report is to be generated	O	Enter the Benefit plan code or select using dropdown arrow, <b>OR</b> leave blank for all health plans

Select  to generate the report:


### Insurance Plan Costs

**Insurance Plan Costs**

List Edit Goto Settings System Help

---

Period test:	Benefit plan test:	Pero no.	Name	Option	Insurance option test	EE costs	EI costs	Provider costs
B-weekly	Basic Life / AD&D	146	Dela Cruz, Emma Celeste	BLF1	Basic Life / AD&D	4.60	0.00	0.00
		184	COWART, CHRISTIE A	BLF1	Basic Life / AD&D	5.00	0.00	0.00
		186	MAYVILLE , RHONDA A	BLF1	Basic Life / AD&D	11.60	0.00	0.00
		236	Logan, Tina Marie	BLF1	Basic Life / AD&D	7.80	0.00	0.00
		265	Houaly Kingsley - NL-3	BLF1	Basic Life / AD&D	5.20	0.00	0.00
		366	Wanda Marable	BLF1	Basic Life / AD&D	12.00	0.00	0.00
		459	Test Ben	BLF1	Basic Life / AD&D	3.40	0.00	0.00
		463	Test Retirement	BLF1	Basic Life / AD&D	3.40	0.00	0.00
		471	CHELSEA TEAL	BLF1	Basic Life / AD&D	0.40	0.00	0.00
		747	LDT5 FUN	BLF1	Basic Life / AD&D	4.80	0.00	0.00
		749	MICHELLE LOVE	BLF1	Basic Life / AD&D	0.40	0.00	0.00
		750	ESTHER HERRING	BLF1	Basic Life / AD&D	7.20	0.00	0.00
		751	HILDEGARDE CAMPEAU	BLF1	Basic Life / AD&D	21.40	0.00	0.00
		752	VIRGINIA MITCHELL	BLF1	Basic Life / AD&D	5.80	0.00	0.00
		754	ASSISTANT DOG	BLF1	Basic Life / AD&D	23.80	0.00	0.00
		756	BRIANNA CARANO	BLF1	Basic Life / AD&D	15.20	0.00	0.00
		764	TEST BENEFIT	BLF1	Basic Life / AD&D	3.80	0.00	0.00
	<b>Basic Life / AD&amp;D</b>					<b>136.00</b>	<b>0.00</b>	<b>0.00</b>
	Long Term Disability	146	Dela Cruz, Emma Celeste	LTD1	Long Term Disability	12.04	0.00	0.00

The report is generated on the screen and can be printed. If finished, select the  icon to exit the report.

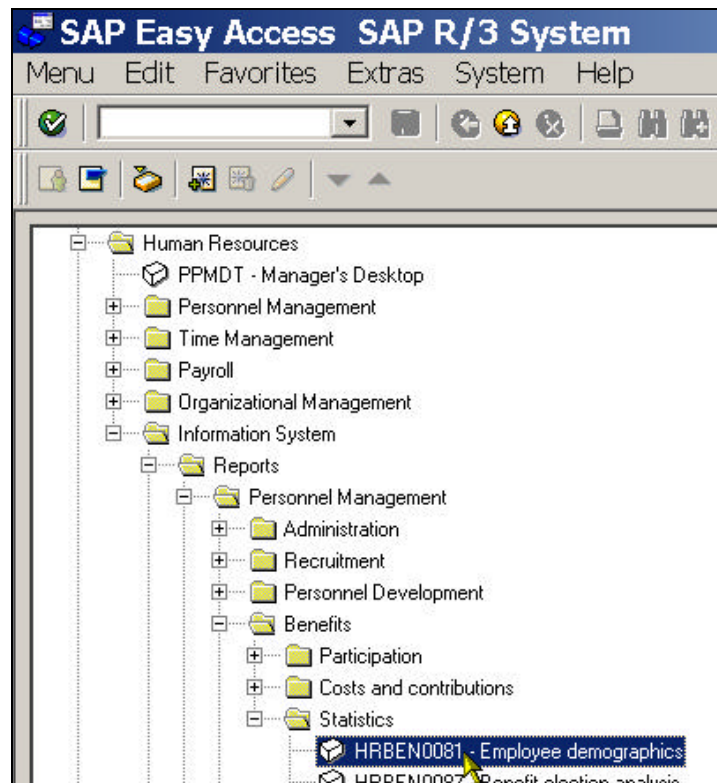


## Employee Demographics

This document describes the procedure required to generate a report showing the Employee Demographics in regard to Benefit plans.

**HUMAN RESOURCES > INFORMATION SYSTEM > REPORTS > PERSONNEL MANAGEMENT > BENEFITS > STATISTICS > HRBEN0081 - Employee demographics**


Transaction code **HRBEN0081**



If using the menu path, double click “**HRBEN0081 – Employee demographics**” to go to the next screen.

Employee Demographics


Field Name	Description	R/O/C	User Action, Values, Comments
<b>Period</b>	Period for which report is to be generated	R	Choose the desired period or enter a beginning and end date if you select the other period.
<b>Personnel Number</b>	Personnel number range you want to report on	O	Enter the desired personnel number, range or leave blank.
<b>Evaluation Date</b>	Date of Evaluation	O	This allows for selection of specific date if a range had earlier been selected.
<b>Age Groups</b>	Age group to be reported on	O	Enter the identifier if known or using the dropdown arrow <b>When selecting more than one program grouping or benefit plan, use multiple selection option</b>

Select  to generate the report:



Employee Demographics

Employee Demographics				
List Edit Goto System Help				
Demographic Employee Data: Overview 1				
Evaluation date 02/12/2001				
PRFT APF Portee FI				
Demographic Employee Data: Overview 2				
Evaluation date 02/12/2001				
Age range	Employees		Smokers	
1 - 19 Total	8	5.71 %	0	0.00 %
Female	2	25.00 %	0	0.00 %
Male	6	75.00 %	0	0.00 %
20 - 24 Total	4	2.86 %	0	0.00 %
Female	3	75.00 %	0	0.00 %
Male	1	25.00 %	0	0.00 %
25 - 29 Total	7	5.00 %	0	0.00 %
Female	5	71.43 %	0	0.00 %
Male	2	28.57 %	0	0.00 %
30 - 34 Total	8	5.71 %	0	0.00 %
Female	6	75.00 %	0	0.00 %
Male	2	25.00 %	0	0.00 %

The report is generated on the screen and can be printed. If finished, select the  icon to exit the report.

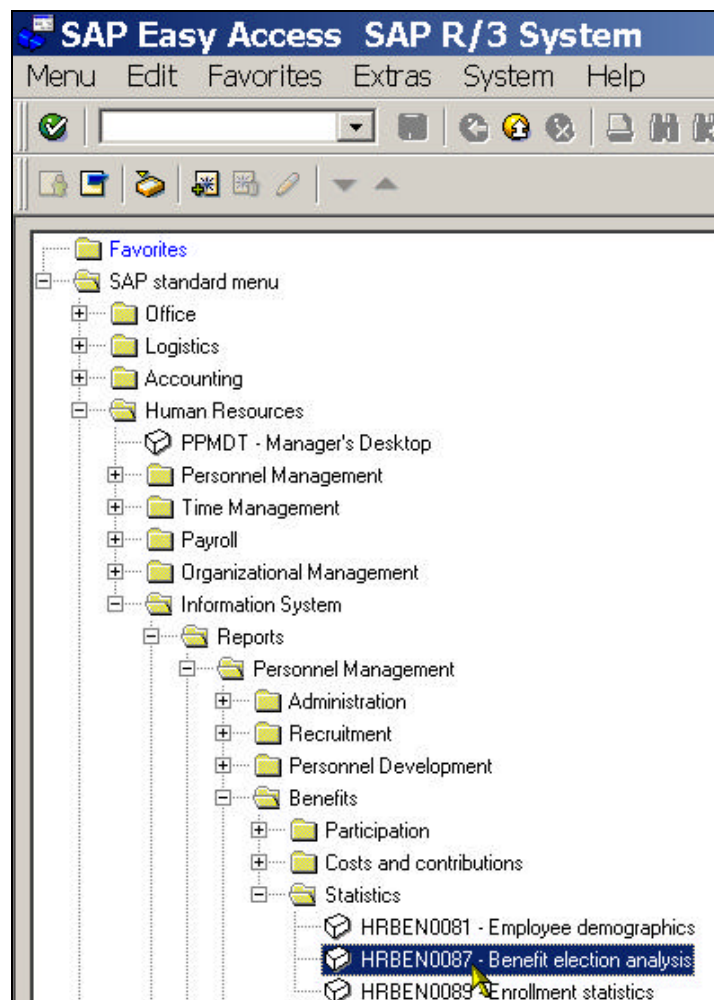


## Employee Benefits Elections

This document describes the procedure required to generate a report showing the Employee Benefits Elections.

**HUMAN RESOURCES > INFORMATION SYSTEM > REPORTS > PERSONNEL MANAGEMENT > BENEFITS > STATISTICS > HRBEN0087 - Benefits Election Analysis**

Transaction code **HRBEN0087**



If using the menu path, double click “**HRBEN0087 – Benefit election analysis**” to go to the next screen.

Benefit Election Analysis

**Benefit Election Analysis**

Program Edit Goto System Help

Further selections Search helps Org. structure

**Selection**

Personnel number to

**Additional data**

Benefit area NU to

1st Program grouping to

2nd Program grouping to

Plan type to


Benefit plan to

**Key dates**




























Starting point on 02/12/2000


Changed on 02/12/2001

Field Name	Description	R/O/C	User Action, Values, Comments
<b>Personnel Number</b>	Personnel number range you want to report on	O	Enter the desired personnel number, range or leave blank for all personnel
<b>Benefit Area</b>	Benefit Area to be reported on	R	Enter NV or select using dropdown arrow
<b>1<sup>st</sup> Program Grouping</b>	1 <sup>st</sup> Program Grouping to be reported on	O	Enter the desired 1 <sup>st</sup> program grouping or select using dropdown arrow
<b>2<sup>nd</sup> Program Grouping</b>	2 <sup>nd</sup> Program Grouping to be reported on	O	Enter the desired 2 <sup>nd</sup> program grouping or select using dropdown arrow
<b>Plan Type</b>	Benefit Plan type to be reported on	O	Enter the desired Plan type or select using dropdown arrow
<b>Benefit Plan</b>	Benefit plans for which report is to be generated	O	Enter the Benefit plan code or select using dropdown arrow, <b>OR</b> leave blank for all health plans
<b>Starting Point on</b>	Start date of Analysis	O	Put in a beginning date to limit the range of report to be generated
<b>Changed on</b>	End date of Analysis	O	Put in an end date to limit the range of report to be generated

Select  to generate the report:

*Benefit Election Analysis*

Benefit Election Analysis				
List Edit Goto Settings System Help				
                          				
Print preview				
Percentage changes between 02/12/2000 and 02/12/2001				
Sel. benefit areas: 1				
Sel. benefit plans: 16				
Description\	Text	Eligible EEs	Participation	Scal. particip.
Navy (MWR)	401K Plan	5,050.00	0.00	5,050.00-
	Aetna Dental	6,750.00	6,500.00	250.00-
	Aetna Medical	6,750.00	5,700.00	1,050.00-
	Basic Life / AD&D	5,700.00	0.00	5,700.00-
	HMO Cigna Medical	6,300.00	0.00	6,300.00-
	Civil Svc Ret - Offset	999,999,999.99	0.00	999,999,999.99-
	Civil Service Retirement Sys	999,999,999.99	0.00	999,999,999.99-
	Fed Employee Retirement Sys	999,999,999.99	0.00	999,999,999.99-
	HMO Grouphealth	2,000.00	0.00	2,000.00-
	HMO KPS	2,000.00	0.00	2,000.00-
	Long Term Disability	5,700.00	3,700.00	2,000.00-
	Optional Life	5,700.00	0.00	5,700.00-
	Retirement	999,999,999.99	0.00	999,999,999.99-
	Retiree Basic Life	999,999,999.99	0.00	999,999,999.99-
	Standard Insurance Dental	2,000.00	0.00	2,000.00-
	Thrift Savings Plan	999,999,999.99	0.00	999,999,999.99-

The report is generated on the screen and can be printed. If finished, select the  icon to exit the report.

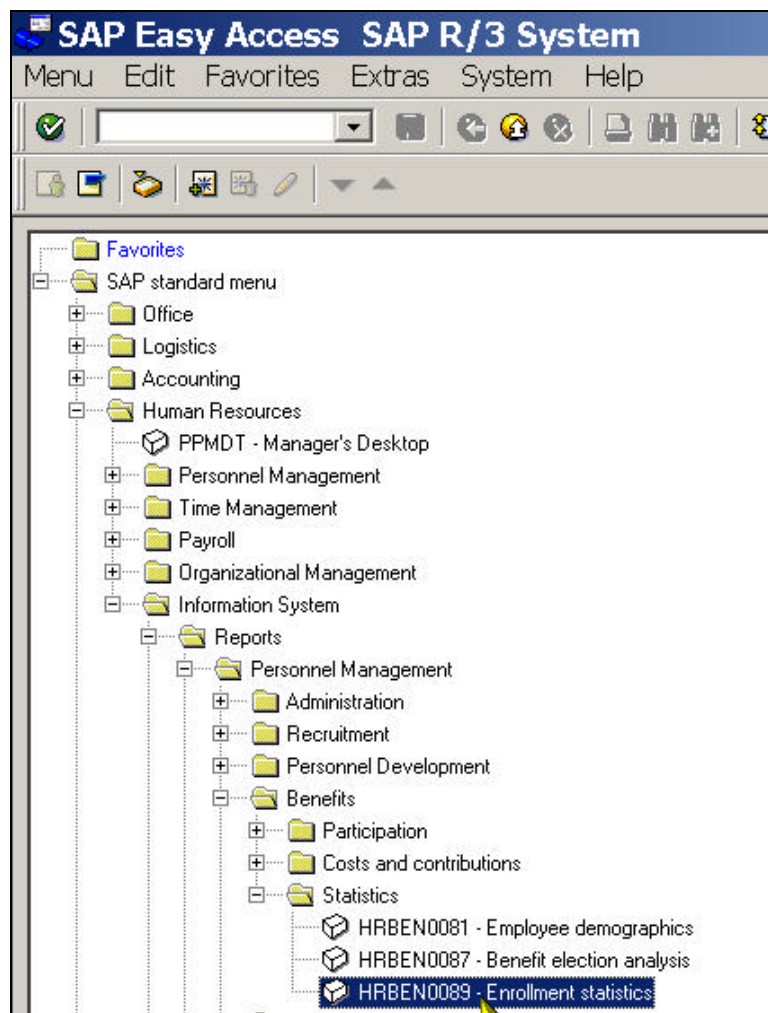


## Benefits Enrollment Statistics

This document describes the procedure required to generate a report showing the Benefits Enrollment Statistics.

**HUMAN RESOURCES > INFORMATION SYSTEM > REPORTS > PERSONNEL MANAGEMENT > BENEFITS > STATISTICS > HRBEN0089 - Enrollment statistics**

Transaction code **HRBEN0089**



If using the menu path, double click “**HRBEN0089 – Enrollment statistics**” to go to the next screen.

*Enrollment Statistics*

**Enrollment Statistics**

Program Edit Goto System Help

Further selections Search helps Org. structure

**Selection**

Personnel number [ ] to [ ]

**Additional data**

Type of enrollment [ ] to [ ]

Plan category [A] to [ ]

Benefit area [ ] to [ ]

1st Program grouping [ ] to [ ]

2nd Program grouping [ ] to [ ]

Plan type [ ] to [ ]

Benefit plan [ ] to [ ]

**Period**

Start 02/12/2001

To 02/12/2001


**Count**

Plans ☒

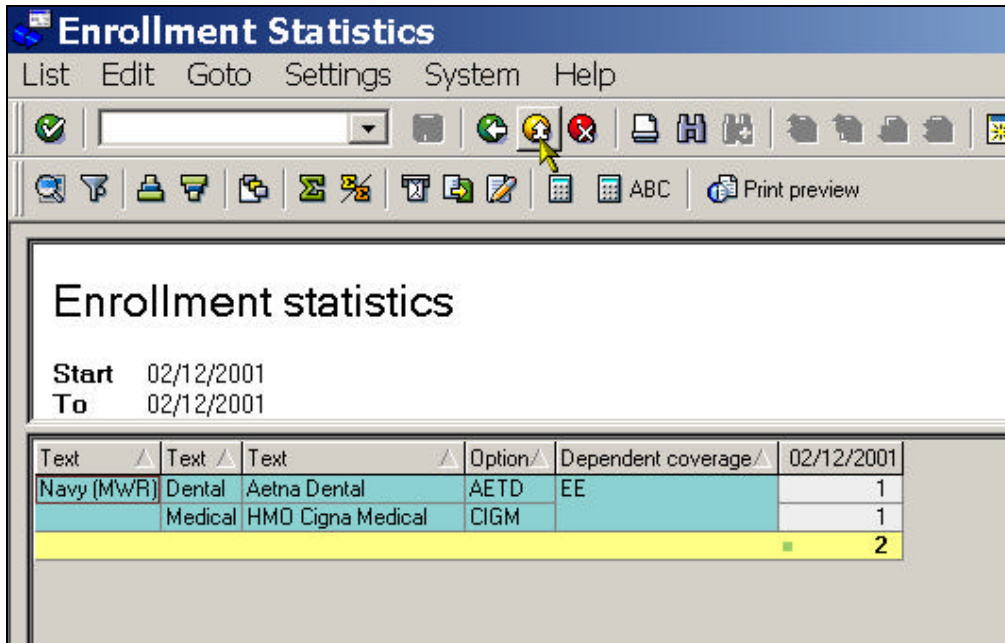
Persons ☐

Field Name	Description	R/O/C	User Action, Values, Comments
<b>Personnel Number</b>	Personnel number range you want to report on	O	Enter the desired personnel number, range or leave blank for all personnel
<b>Type of Enrollment</b>	Type of Benefit Enrollment	O	Select the type of enrollment using the dropdown arrow
<b>Plan Category</b>	Category of plan to be reported on	O	Enter category or select using the dropdown arrow
<b>Benefit Area</b>	Benefit Area to be reported on	R	Enter NV or select using dropdown arrow
<b>1<sup>st</sup> Program Grouping</b>	1 <sup>st</sup> Program Grouping to be reported on	O	Enter the desired 1 <sup>st</sup> program grouping or select using dropdown arrow
<b>2<sup>nd</sup> Program Grouping</b>	2 <sup>nd</sup> Program Grouping to be reported on	O	Enter the desired 2 <sup>nd</sup> program grouping or select using dropdown arrow


<b>Plan Type</b>	Benefit Plan type to be reported on	O	Enter the desired Plan type or select using dropdown arrow
<b>Benefit Plan</b>	Benefit plans for which report is to be generated	O	Enter the Benefit plan code or select using dropdown arrow, <b>OR</b> leave blank for all health plans
<b>Period</b>	Period start and end date	R	Enter dates for beginning and end of range
<b>Count</b>	How the Enrollment Statistics are to be counted, either by “Plans” or by “Persons”	R	Select either plans OR persons
<b>Summary</b>	Either Discrete or Cumulative Summary	R	Select either Discrete (current) or Cumulative (historical)

Select  to generate the report:

*Enrollment Statistics (Discrete)*



Text	Text	Text	Option	Dependent coverage	02/12/2001
Navy (MWR)	Dental	Aetna Dental	AETD	EE	1
	Medical	HMO Cigna Medical	CIGM		1
					2

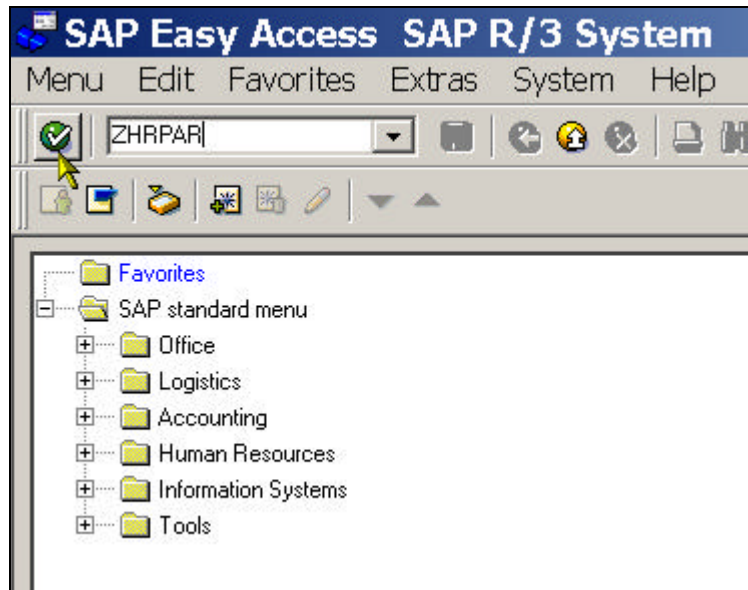
The report is generated on the screen and can be printed. If finished, select the  icon to exit the report.






## Personnel Action Report

Print a personnel action report using the transaction code ZHRPAR.



Select  to go to the next screen:

### **HR: Personnel Action Report**

HR: Personnel Action Report

Program Edit Goto System Help

Further selections Search help Sort

Period

☒ Today ☐ Current month ☐ Current year

☐ Up to today ☐ From today To

☐ Other period

Selection

Personnel number 62 to

Remarks

One Year Probation Commencing

SL Balance

AL Balance


Remark 1

Remark 2

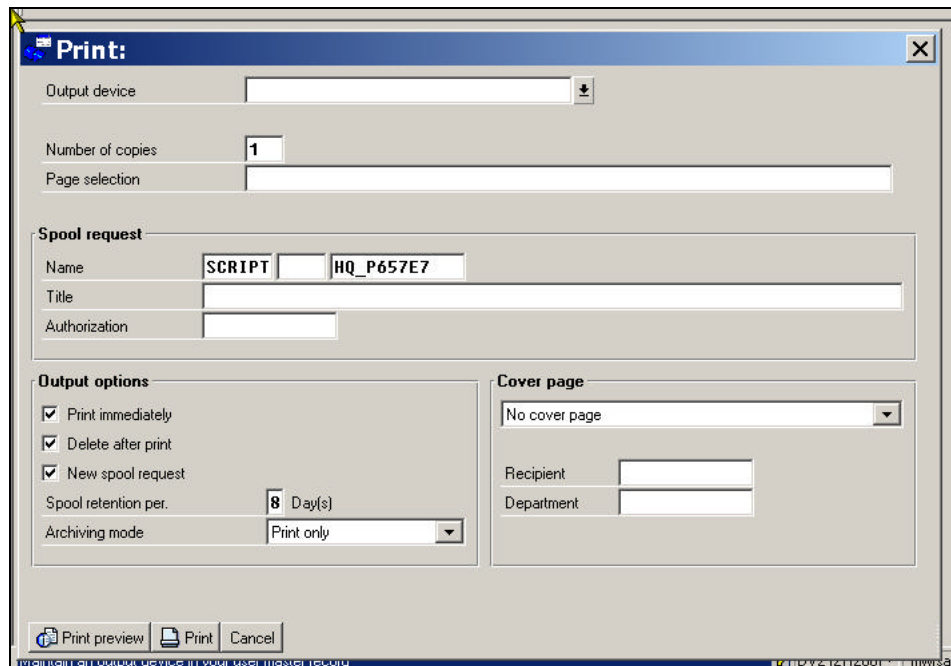
NAF Manager



Field Name	Description	R/O/C	User Action, Values, Comments
<b>Period</b>	Date or dates to be reported on	R	Check “today” for today’s date <b>OR</b> check today and enter a range of dates
<b>Personnel number</b>	Personnel number identifier	O	Enter number or range of numbers. Use the dropdown arrow if number is not known
<b>Remarks</b>	Remarks, NAF manager’s name	O	Enter any remarks to be printed on the PAR, enter the name of the NAF manager to be printed on the PAR


Select  to generate report.

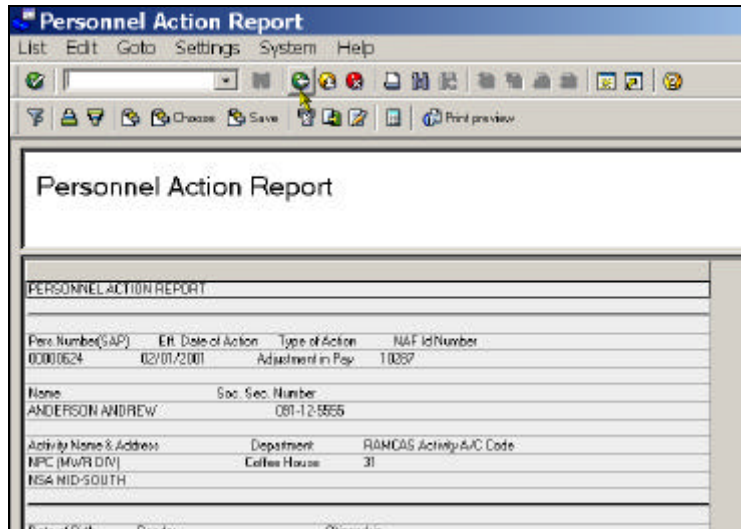
Print:



The screenshot shows a 'Print:' dialog box with the following fields and options:

- Output device:** A dropdown menu with a small arrow icon.
- Number of copies:** A text box containing the value '1'.
- Page selection:** A text box.
- Spool request:**
  - Name:** Two text boxes containing 'SCRIPT' and 'HQ\_P657E7'.
  - Title:** A text box.
  - Authorization:** A text box.
- Output options:**
  - ☒ Print immediately
  - ☒ Delete after print
  - ☒ New spool request
  - Spool retention per.:** A text box containing '8' followed by 'Day(s)'.
  - Archiving mode:** A dropdown menu with 'Print only' selected.
- Cover page:**
  - Cover page:** A dropdown menu with 'No cover page' selected.
  - Recipient:** A text box.
  - Department:** A text box.
- Buttons:** 'Print preview', 'Print', and 'Cancel'.

Click the dropdown arrow to select a printer, then select  Print preview.



**Personnel Action Report**

PERSONNEL ACTION REPORT

Person Number(SAP)	EFT Date of Action	Type of Action	NAF Id Number
0000624	02/01/2001	Adjustment in Pay	10357

Name	Soc. Sec. Number
ANDERSON ANDREW	081-12-5555

Activity Name & Address	Department	RAN/CAS Activity A/C Code
NPC (MWR DIN)	Coffee House	31
NSA MID-SOUTH		

Be sure to email PAR to ADP payroll person before printing!

- Click on envelope icon (under the green arrow)
- Click attachment document content
- Select recipient using drop down arrow
- Select internal user and green check
- Fill in last name, first name
- Click send

Select green arrow  for portrait Print Preview.


PAR: Portrait print preview

**Print Preview for HCS7 Page 00001 of 00001**

Text Edit Goto System Help


**PERSONNEL ACTION REPORT**

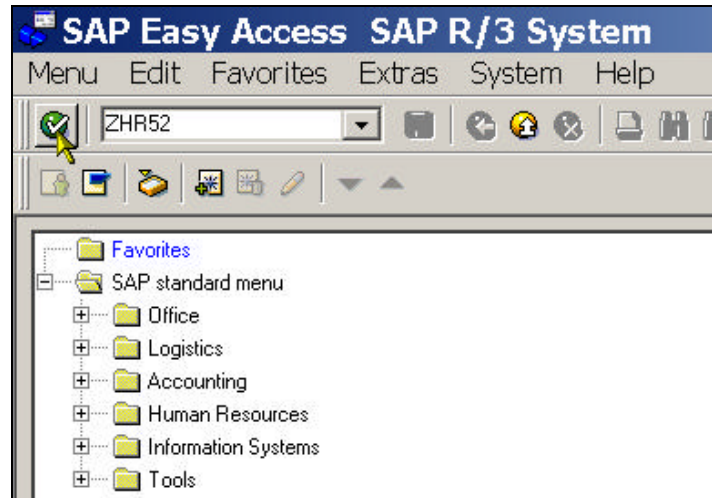
1 PERSONNEL NUMBER (DATA)	11 EFFECTIVE DATES OF ACTION	12 TYPE OF ACTION	13 PAY ID NUMBER
00000624	02/01/2001	Adjustment in Pay	1020T
14 NAME	15 SOCIAL SECURITY NUMBER		
ANDERSON ANDREW	001-12-5555		
16 ACTIVITY NAME & ADDRESS	17 CRIME TYPE	18 KAMEAS ACTIVITY ACCOUNT CODE	
NPC (MWR DIV) NSA MD- SOUTH	Critter House	01	
19 DATE OF BIRTH	20 GENDER	21 COUNTRY	
06/25/1958	MALE	US CHINA	
22 EDUCATION US AND BGR	23 COLLEGE DEGREE	24 MAJOR FIELD OF STUDY	
ND			
25 EMPLOYMENT CATEGORY	26 DUTY STATUS	27 A/E PAY DEPARTMENT	28 FUND SOURCE

Now select the  icon to print the Personnel Action Report you selected. Select  to go back to original screen. Select  again to go back to SAP Easy Access screen.



## Request for Personnel Action (52)

Use transaction code **ZHR52**, and select  to go to the next screen.



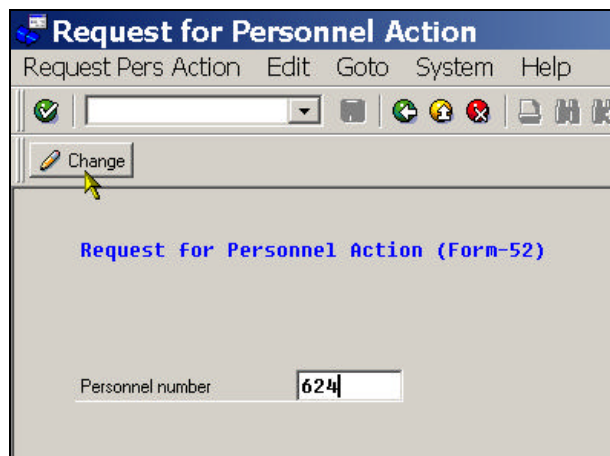
There are two ways to generate a request for personnel action:

- with personnel number

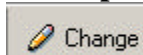
**-OR-**

- with position number.

### Request for Personnel Action





To use **personnel number**, enter it into the personnel number field, and select the



icon.

Request for Personnel Action

Enter any applicable remarks to be printed on the 52. Select the  icon to continue.

Select output device, then  Print preview. The 52 should look like the following illustration:

The “landscape” view appears. Select the  to get the “portrait” view.

Request for Personnel Action

**Print Preview for HCS7 Page 00001 of 00001**

Text Edit Goto System Help

Form-52 **REQUEST FOR PERSONNEL ACTION**



**PART A - Regarding Release** Pers. No. (SAP) 00000004

1 ACTION REQUESTED	2 REQUEST NUMBER
3 FOR ADDITIONAL INFORMATION CALL (NAME & TELEPHONE)	4 PROPOSED EFFECTIVE
5 ACTION REQUESTED BY	6 ACTION ANTICIPATED BY

**PART B - For Preparation of SF 50**


1 NAME (LAST, FIRST) ANDERSON ANDREW	2 SOCIAL SECURITY NUMBER 081-25-5555	3 DATE OF BIRTH 08/25/1958	4 EFFECTIVE DATE 02/01/2001
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FIRST ACTION		SECOND ACTION	
CODE	NATURE OF ACTION - LEGAL AUTHORITY	CODE	NATURE OF ACTION - LEGAL AUTHORITY

Select the  to print.  
To generate the report by position number, in the initial screen, leave personnel number blank, then select the  Change icon.

**Request for Personnel Action**

Request Pers Action Edit Goto System Help

 Change

**Request for Personnel Action (Form-52)**

Personnel number

Enter the applicable information on the next screen:

**Request for Personnel Action/New Employee**

PersData System Help

Request for Personnel Action (Form 52) **NEW EMPLOYEE**

**PART A: Requesting Office**

Action requested: **NEW HIRE** Request no:

Add info Name: **JOHN DOE** Telephone:  Eff date: **02/12/2001**

Action requested by: **LEZA GIBBONS** Date: **02/12/2001** Action authorized by: **JOHN TESH** Date: **02/12/2001**

**PART B: For Preparation of SF 50**

Name (Last): **DOE** Soc. Sec. no: **000-00-0000** Birth date: **06/09/1970**

Name (First): **JOHN** Eff date: **02/12/2001**

**ACTION**

Code	Nature of Action/Legal Authority

Select the  icon to print. Be sure to select  Print preview to verify entries and email before printing!

- Click on envelope icon (under the green arrow)
- Click attachment document content
- Select recipient using drop down arrow
- Select internal user and green check
- Fill in last name, first name
- Click send